Customer Administration Portal
User Guide

Customer Administration Portal User Guide

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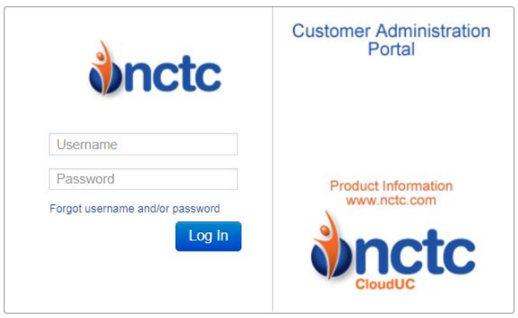
Customer Administration Portal

Administrators and End Users can control every aspect of the solution in one place with this web-based Administration Portal experience.

As you use this guide, you may see options that don't show up on your screen. Options are available based on your services. Some services like recording, and call center are only visible if they are included in your account. Contact us if you see options that you would like to add to your account.

Section 1: Customer Administration Portal Access

Below are instructions on how to access your Customer Administration Portal, and how to edit individual profiles. Both the Administrator and every End User will receive credentials via email from NCTC to access their individual Portal.



1.1 Log-in

- Go to cloudUC.nctc.com.
- Enter username and password.
    - Username and password information is emailed to every customer shortly after order completion or during your install.

1.2 Edit Profile

Click on the arrow next to the name in the upper right-hand corner to:

- Upload a profile picture
- Change password
- Change security questions
- Manage opt-ins

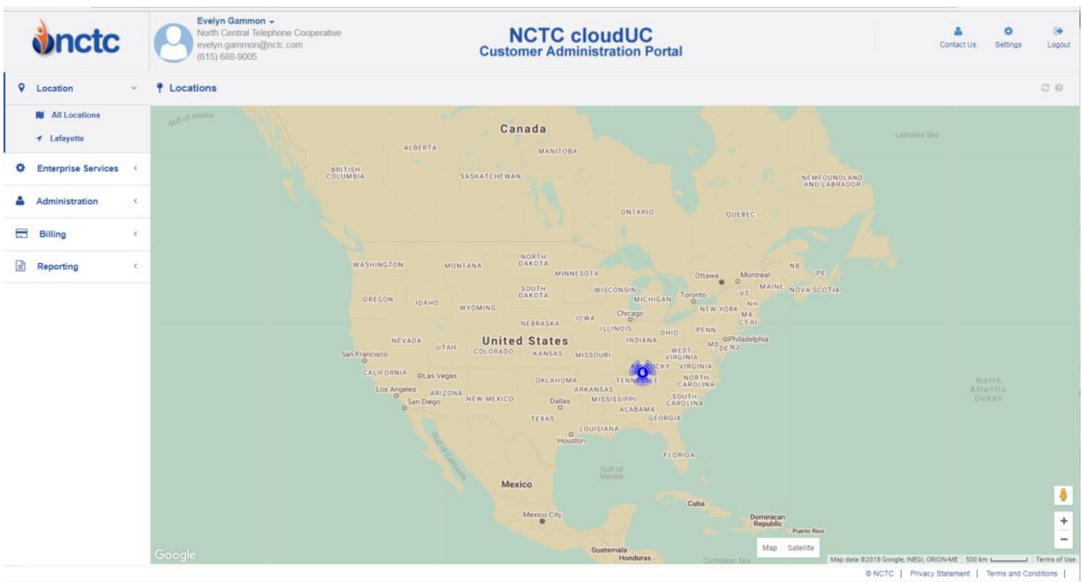
Click on the arrow next to the company name in the upper right-hand corner to:

- Edit company name
- Edit company phone number
- Edit company address
- Change time zone

Section 2: Customer Administration Portal Overview

2.1 Administrator vs. End User

This Customer Administration Portal (CAP) includes a Customer Administrator Portal for the company's Administrator, as well as individual Customer Administrator Portals for every seat or End User. The Administrator has access to the entire company's phone system and can manage and edit every seat. The End User has access to his/her own seat and services only.



2.2 User Information

At the top of the screen you will see the user information for whoever is logged. Use the arrow next to the name to make any changes to the user or account information.

2.3 Top ribbon

Use the links her to easily contact us, change company settings, or to logout as shown above.

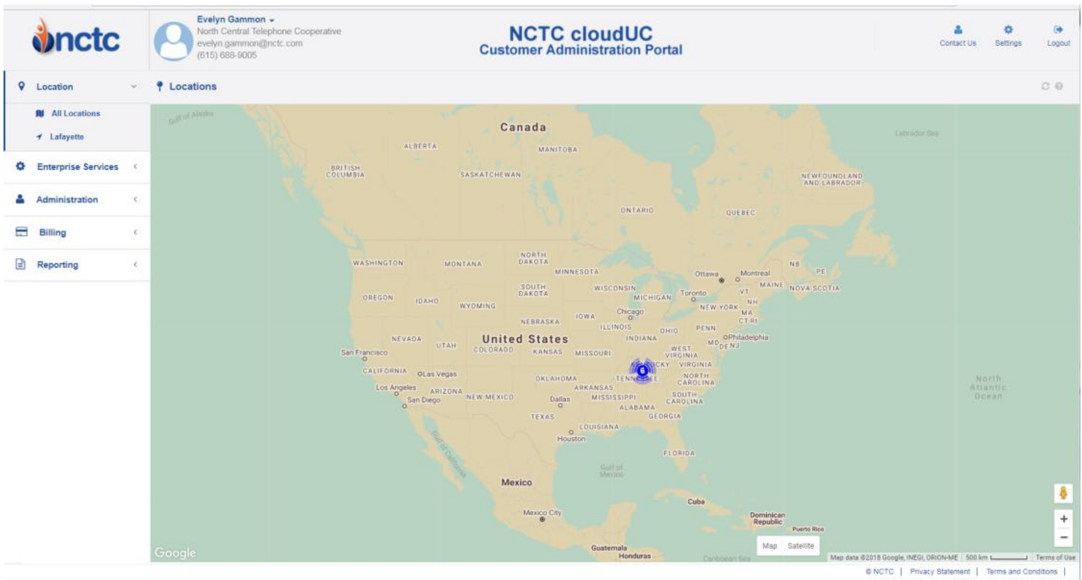
2.4 Tabs on the Left

Access the tabs to the right (**Location, Enterprise Services, Administration, Billing, and Reporting**) to manage specific functions of your seat or your company's services.

Section 3: Location Tab

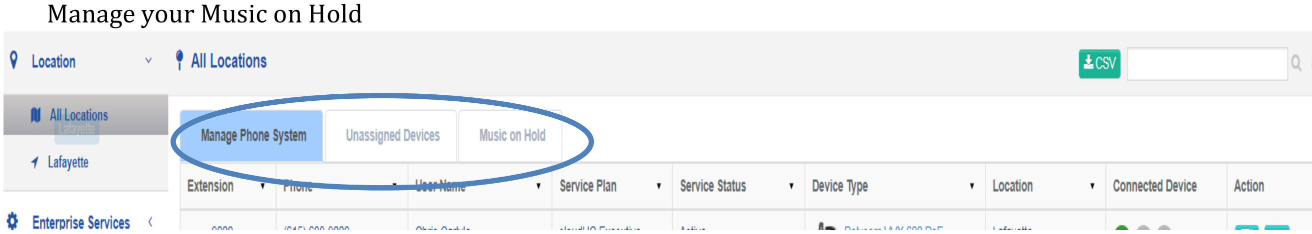
When you log in to your Customer Administration Panel, you will be on your **Location Screen.**

- Click on the location tab to view multiple office locations.
- Zoom in to location to see specific location information.



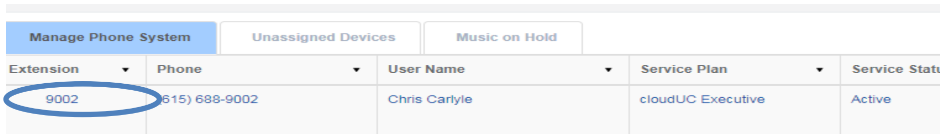
Once you click on either all locations or a single location you will see a menu across the top of the screen that lets you:

- Manage your Phone System
- View and assign any unassigned devices in your system.
- Manage your Music on Hold



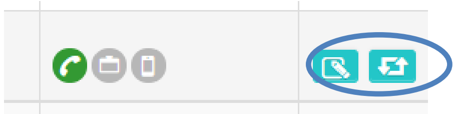
3.1 Manage an Individual Phone or Extension

1. To manage extension features, locate the extension in the list and click **Edit**.



2. To edit the extension number itself, click the number and enter a new one.

3.2 Reassign Extension or Another User

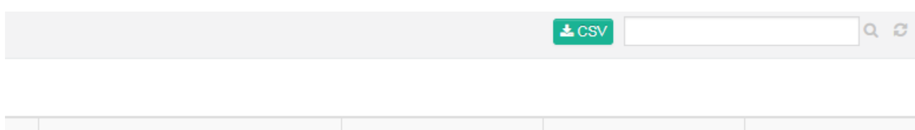


1. Click **Reassign**.

2. Click the drop-down arrow and select a username.
    a. **Note:** To add a new user, see the Administration and Access Tab; <u>Add Users.</u>
3. Click **Save**.

3.3 Download Extension Details as CSV

Click **Download as CSV**.

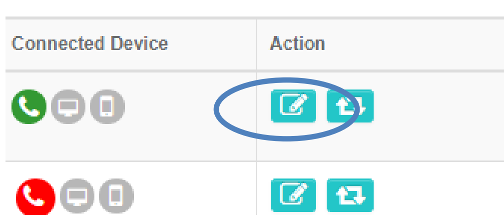


1.

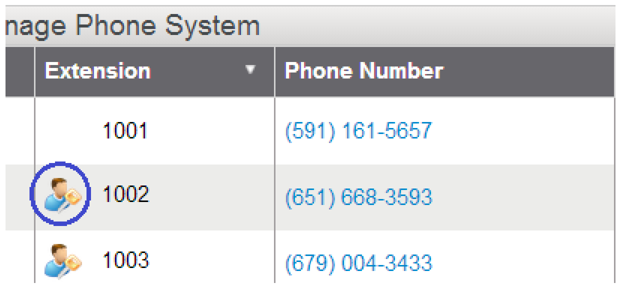
1. When the confirmation message appears, click **Yes**.
2. Open the Excel worksheet.

3.4 Sync a Password Across All NCTC cloudUC Applications

Users typically have different login passwords for the NCTC cloudUC Customer Administration Portal, NCommand desktop soft phone, NCTC cloudUC Now collaboration solution and NCommand mobile phone applications. A customer can simplify the login process by syncing these applications so users can enter their NCTC cloudUC Customer Administration Portal password for all applications.



1. Click the  icon next to the user's extension number.



2. Enter the user's current cloudUC Customer Administration Portal password.
3. Click **Sync.**
4. When the confirmation message appears, click **Close.**

3.5 Manage Phone and Extension Features

Click on the edit button to access features.

As a user you my edit features associated with your extension. As an administrator, you can edit a phone features associated with extensions in your account, including:

- Incoming Calls
- Outgoing Calls
- Messaging
- Call Control
- E911 Service Address
- Time Zone

3.5.1 Incoming Calls

You can select multiple options for handling incoming calls, including:

- Alternate Numbers
- Automatic Hold/Retrieve
- Anonymous Call Rejection
- Call Forwarding Always
- Call Forwarding Busy
- Call Forwarding No Answer
- Call Forwarding Not Reachable
- Call Forwarding Selective
- Call Notify
- Calling Number Delivery
- Do Not Disturb
- Selective Call Acceptance/Rejection
- Simultaneous Ring Personal

Alternate Numbers

Users can be assigned up to 10 alternate phone numbers in addition to their main phone number. These must be direct inward dialing numbers (DIDs). Callers can reach users at their primary phone numbers by dialing any of their alternate phone numbers.

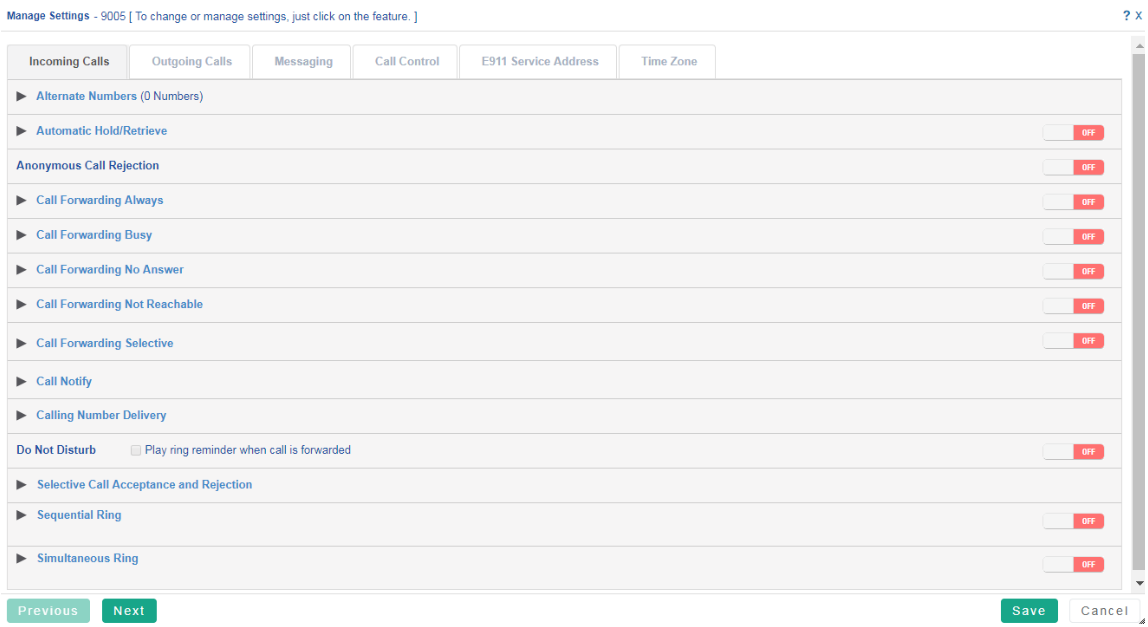
One of four ring patterns can also be associated with each alternate number:

- Normal
- Long-Long
- Short-Short-Long
- Short-Long-Short

Note: The user's device must be able to support a distinctive ring pattern. If it doesn't, then the normal ring pattern is applied.

Set up Alternate Numbers

1. Click next to **Add Alternate Numbers**.
2. Click the **Phone Number** drop-down arrow and select a number.
3. (optional) Click the **Ring Pattern** drop-down arrow and select a ring pattern.



Note: The **Set a distinctive ring for up to ten alternate numbers** field must be set to **On**.

4. Click **Save**.

Section 1: Add or Delete Alternate Numbers

To add more alternate numbers:

1. Click next to **Add Alternate Numbers**.
   Note: The maximum supported is 10.
2. Click **Save**.

To delete an alternate number:

1. Click in the row displaying that number.
2. When the confirmation message appears, click **Yes**.

3. Click **Save**.

Automatic Hold/Retrieve

Extensions can be enabled to automatically hold and retrieve incoming calls without entering feature access codes. This feature is especially useful for attendants managing large volumes of incoming calls. When an incoming call is transferred to a dedicated parking station, it is automatically put on hold. When the attendant is ready to take the call, they simply retrieve the call from the parking station. If a call is held longer than the preconfigured time limit, it is automatically returned to the attendant.

1. Set **Automatic Hold/Retrieve** to **On**.
2. Enter the number of seconds calls will be held before being automatically retrieved.
   Note: The default is 120 seconds.
3. Click **Save**.

Anonymous Call Rejection

Calls that come in with blocked caller ID (no phone number or name displayed) can be rejected. Callers hear an announcement that the user does not accept anonymous calls. The user's phone does not ring when an anonymous call is attempted.

1. Set **Anonymous Call Rejection** to **On** or **Off** to reject or accept anonymous calls.
2. Click **Save.**

Call Forwarding Always

All incoming calls can be redirected to another destination. The destination phone number must be permitted by the user's calling plan. Emergency, repair and chargeable directory assistance phone numbers cannot be destinations.

1. Set **Call Forwarding Always** to **On**.
2. Enter the destination phone number.
3. (optional) Check **Play ring reminder when call is forwarded** to hear a ring splash when calls are forwarded.
4. Click **Save**.

Call Forwarding Busy

Incoming calls can be redirected to another destination when the user's extension is busy. The destination phone number must be permitted by the user's calling plan. Emergency, repair and chargeable directory assistance phone numbers cannot be destinations.

1. Set **Call Forwarding Busy** to **On.**
2. Enter the destination phone number.
3. Click **Save**.

Call Forwarding No Answer

Incoming calls can be redirected to another destination when the user does not answer within a specified number of rings. The destination phone number must be permitted by the user's calling plan. Emergency, repair and chargeable directory assistance phone numbers cannot be destinations.

1. Set **Call Forwarding No Answer** to **On**.
2. Enter the destination phone number.
3. Click the pull-down arrow and select the number of rings before calls are forwarded.

4. Click **Save**.

Call Forwarding Not Reachable

Incoming calls can be automatically forwarded when the user's device is unreachable or unregistered. For example, if a desk phone becomes inoperable because of a power failure, incoming calls to that extension can be redirected to the user's cell phone.

The destination phone number must be permitted by the user's calling plan. Emergency, repair and chargeable directory assistance phone numbers cannot be destinations.

1. Set **Call Forwarding Not Reachable** to **On**.
2. Enter the destination phone number.
3. Click **Save**.

Call Forwarding Selective

Incoming calls can be forwarded to specific destinations based on defined rules. For example, calls originating from a particular phone number can be selectively forwarded.

1. Set **Call Forwarding Selective** to **On**.
2. Enter the **Default Destination Number** that will be used when this feature is enabled and no other call forwarding number is selected.
3. (optional) To hear a ring splash when calls are forwarded, set **Play ring reminder when call is forwarded** to **On**.
4. Click ⊕ to add a Call Forwarding Selective rule.
    a. Set **Enabled** to **On**.
    b. Enter a description of the rule.
    c. Choose one of the following options:
        - Select **Forward to a Specified Number** and enter a destination phone number; or
        - Select **Forward to Default Number.**
          Note: The **Default Forward Number** entered earlier will be used.
    d. Select whether to forward **All Calls** or **Specific Numbers** from which calls will be forwarded.
        i. If specifying a number, enter it.
        ii. To add more numbers, click ⊕.
        iii. To delete a call-forwarding number, click ⊖ and then **Yes** when the confirmation message appears.
5. Click **Save**.

Note: To delete a call-forwarding rule, click ⊖ and then **Yes** when the confirmation message appears.

Call Notify

Users receive email notifications when incoming calls arrive. The notifications provide the caller's name and phone number. They can be triggered by all calls or selected calls.

1. Select the email address where the notification will be sent.
2. Click ⊕ to add a Call Notify rule.
3. Set **Enabled** to **On**.

4. Enter a description of the rule.
5. Select whether to apply the rule to **Any Phone Number** or **Following Phone Numbers**.
6. If you select **Following Phone Numbers**:
    a. Check at least one of the following boxes:
        - Any Private Number (the caller ID is blocked)
        - Any Unavailable Number (the caller ID is not being provided to the cloudUC phone system)

        OR

    b. Specify at least one number.
        - Click to add numbers.
        - Click and then **Yes** when the confirmation message appears to delete numbers.
7. Click **Save.**

Note: To delete a rule, click and then **Yes** when the confirmation message appears.

Calling Number Delivery

The caller ID for incoming external and internal calls can be turned on or off. This feature is useful when an organization needs to protect the privacy of customers or other callers.

1. Set **External Calling Number Delivery** and/or **Internal Calling Number Delivery** to **On** or **Off,** depending on whether you want to display or block incoming caller ID.
2. Click **Save**.

Do Not Disturb

When this feature is enabled, calls are processed as if the extension is busy and cannot receive calls.

1. Set **Do Not Disturb** to **On**.
2. (optional) Check **Play ring reminder when call is forwarded** to hear a ring splash when calls are forwarded.
3. Click **Save**.

Selective Call Acceptance / Rejection

Calls can be selectively accepted or rejected, depending on the caller's phone number.

1. Choose whether to allow **Selective Call Acceptance** or **Selective Call Rejection.**
2. Click to highlight the number to accept/reject and then click . The number now appears in the **Accept/Reject These Calls** column.
   Note: To select multiple numbers, hold the **Shift** key while highlighting numbers.
3. To manually add a number to the **Accept/Reject These Calls** column, enter it in the **Add a Phone Number** field and click .
4. To remove a number from the **Accept/Reject These Calls** column, click .

Simultaneous Ring Personal

Up to 10 destinations can ring simultaneously when a user receives an incoming call. For example, the user's home phone and cell phone can ring along with their office phone.

1. Set **Simultaneous Ring Personal** to **On**.

5. Choose either **Don't ring simultaneous numbers if on a call** or **Always ring**

Simultaneous numbers.

1. Click ⊕ to add simultaneous ringing numbers.

   Note: To delete a number, click ⊖ and then click **Yes** when the confirmation message appears.
2. Check the **Answer Confirmation** box to prompt users to press a digit confirming that they accept the call.
3. Click ⊕ to add a Simultaneous Ring Personal rule.
   a. Set **Enabled** to **On**.
   b. Enter a description of the rule.
   c. Select whether simultaneous ringing applies to **All Calls** or **Specific Numbers** that will trigger simultaneous ringing.
   d. If you selected **Specific Numbers**:
      i. Enter at least two numbers in the fields provided.
      ii. To add more numbers, click ⊕.
      iii. To delete a number, click ⊖ and then **Yes** when the confirmation message appears.
4. Click **Save**.

Note: To delete a rule, click ⊖ and then **Yes** when the confirmation message appears.

3.5.2 Outgoing Calls

Administrators can set up call-handling options for outgoing calls, including:

- Make International Calls
- Line ID Blocking
- Calling Line ID
- Personal List
- Speed Dial 100

Make International Calls

Administrators can enable or prevent international calls from users' extensions.

1. Set **Make International Calls** to **On** or **Off**, depending on user permissions.
2. Click **Save**.

Line ID Blocking

Administrators can block a user's outgoing caller ID so that call recipients do not know who is calling.

1. Set **Line ID Blocking** to **On** or **Off,** to choose if the user's caller ID is to be displayed.
2. Click **Save**.

Calling Line ID

Administrators can decide whether a user's outgoing caller ID will be the user's own phone number or another group phone number.

1. Select the chosen Calling Line ID from the drop-down menu.

Note: The phone number that will be displayed is listed in the drop-down menu.

2. Click **Save.**

Personal List

Frequently called numbers can be entered so users can dial them easily.

1. Click to add contacts.
2. Enter the contact's name.
3. Enter the contact's phone number.
4. Click **Save**.

- **Note:** Click to remove a contact from the list.

Speed Dial 100

Administrators can designate 2-digit speed codes for up to 100 phone numbers. The speed codes are preceded by # when dialing.

1. Click to add more contacts.
2. Click the **Speed Dial** drop-down arrow and select a 2-digit speed code.
3. Enter the contact's telephone number.
4. Enter the contact's name.
5. Click **Save**.

- **Note:** Click to remove a contact from the list.

3.5.3 Messaging

Administrators can configure these options for messaging:

- Voicemail Distribution Lists
- Voicemail Greetings
- Voice Email Management
- Aliases
- Voicemail

Voicemail Distribution Lists

By creating up to 15 distribution lists (selected through the Customer Administration Portal main menu), users can send new or forwarded voice messages to multiple recipients simultaneously.

1. Enter a description of the distribution list.
2. Click to add a phone number to the list.
3. Enter the phone number.
4. To add more phone numbers, click again.

Note: To remove phone numbers, click and then click **Yes** when the confirmation message appears.

Voicemail Greetings

Administrators can select to play default system greetings or uploaded customized greetings when a caller reaches a user's voicemail.

Busy Greeting

This is the greeting callers hear when the extension is busy and the call goes to voicemail.

1. Select **Default Greeting** or **Custom Greeting**.
2. For Custom Greeting, click **Browse** to upload an audio file.
3. To upload an audio file, click **Choose**, select a file on your computer, then click **Save.**
4. To listen to an uploaded greeting, click **Play.**

No Answer Greeting

This is the greeting callers hear when the call is not answered. The steps are the same as for *Busy Greeting* above. You can upload multiple custom greetings and then select which one you want callers to hear.

Voice Email Management

These options let you decide which calls to send to voicemail and whether to receive email notification of voicemail.

1. Set **Voice Email Management** to **On**.
2. Check the appropriate boxes:
   - Send All Calls to Voicemail
   - Send Busy Calls to Voicemail
   - Send Unanswered Calls to Voicemail
3. If the user retrieves voice messages using both their phone and email, select **Use unified messaging** and set **Use Phone Message Waiting Indicator** to **On**.

   Note: This option provides a stutter tone (and blinking light, on some phones) to inform users they have messages waiting.
4. If the user always listens to voice messages through email, and does not retrieve them by phone, select **Forward to email.** Notifications will be sent to the email address displayed in the **Email will be sent to** field.
5. You can also configure these additional options:
   a. To send a copy of the message to an additional email address, enter the address in the **Forward a copy of this email** field and select **On.**
   b. To let callers transfer out of voicemail by pressing 0, enter a number in the **Transfer on '0' to this phone number** field, and select **On.**
6. Click **Save**.

Aliases

This feature allows you to assign phone numbers, such as your office number or cell phone number, from which you can directly access your voicemail.

1. Click ⊕ to add a phone number to the list.
2. Enter the phone number.
3. To add more phone numbers, click ⊕ again.

   Note: To remove phone numbers, click ⊖**,** then click **Yes** when the confirmation message appears.
4. Click **Save.**

Voicemail

The Voicemail feature makes it easy for users to manage their voicemail services or change their pass codes from any phone.

1. Set **Auto-login to Voice Portal when calling from my phone** to **On**. This allows users to

automatically log in to voicemail when calling from their own phone or device.
2. To change a user's voicemail pass code, enter digits in the field provided.
3. To upload a recorded name that is announced by the auto attendant or voicemail system:
    a. Click **Browse > Choose.**
    b. Select a file from your computer and click **Submit**.

    Note: When logged in to voicemail, users can record (and delete) their names using their phones.

4. Click **Save.**

3.5.4 Call Control

The following functions are provided for call control:

- Call Transfer
- Call Waiting
- Music on Hold
- Shared Line Appearance / Busy Lamp Field

Call Transfer

Call transfer enables users to redirect calls to another extension. Call transfers can be blind, with third-party consultation or announced, e.g., with three-way consultation.

- **Blind Transfer:** user transfers the caller without consulting the destination party.
- **Transfer with Third-Party Consultation**: user consults with the third party before transferring the caller.
- **Announced Transfer**: user has a three-way call with the original caller and the third party before transferring the caller.

The Call Transfer Recall feature enables users to recall the transferred call if, for any reason, it is not answered.

The Busy Camp On feature allows users to camp on a busy destination. If the destination becomes idle within a selected time period, the camped call alerts the destination party. If the camped call is not answered within the time period, the call returns the transferring party. **Note:** Busy Camp On applies only to blind call transfers.

The Diversion Inhibitor feature prevents transferred calls from being redirected again by the transferred-to party. When used with Call Transfer Recall, it ensures that the call is handled by a live person, if the transferred-to destination is unavailable.

1. Set **Call Transfer Recall** to **On** or **Off.**
2. If Call Transfer Recall is **On**, click the pull-down arrow and select the number of rings after which the unanswered call will be recalled to the transferring party.
3. Set **Busy Camp on** to **On** or **Off**.
4. If Busy Camp on is **On**, enter the number of seconds calls will be camped.
5. Set **Diversion Inhibitor for Blind Transfers** to **On** or **Off**.
6. Set **Diversion Inhibitor for Consultative Transfers** to **On** or **Off.**

7. Click **Save**.

Call Waiting

When this feature is enabled, users hear a call waiting tone alerting them that they have another call while they are on the phone. Users can go back and forth between the two calls.

Set **Call Waiting** to **On** or **Off**, depending on user preferences.

Music on Hold

Administrators can enable music files to be broadcast while callers are in queue, on hold, camping on a busy extension, etc.

Set **Music on Hold** to **On** or **Off**, depending on user preferences. The default is **On**.

Shared Line Appearance / Busy Lamp Field

Shared Line Appearance allows calls to appear at multiple locations simultaneously. For example, incoming calls can be answered on any device sharing that line, and outgoing calls from a secondary location, such as an assistant's desk phone, appear to originate from the executive's phone.

Essentially, all shared line locations behave as if they are extensions of a single line or user.

Busy Lamp Field allows a device to monitor the phone status of multiple users. For each monitored user, the device shows whether the user is busy and whether they are on an incoming or outgoing call.

To add users to Shared Line Appearance / Busy Lamp Field:

1. Click ⊕ in the appropriate field.
2. Click the drop-down arrow and select the user you want to add.
3. To add more users, click ⊕ again.

   Note: To remove users, click ⊖ and then click **Yes** when the confirmation message appears.
4. Click **Save.**

3.5.5 E911 Service Address

To ensure that emergency personnel come to the correct location when users dial 911, an E911 Service Address must be associated with each extension.

User Traveling Outside U.S.

Note: E911 service is disabled when **User Traveling Outside the U.S.** is **On**.

1. Set the **User Traveling Outside the U.S.** field to **On**.
2. Click **Save E911 Changes**.
3. Click **Save**.

Modify E911 Service Address

1. Update the address fields.
2. Click **Save E911 Changes**.
3. Click **Save**.

3.6 Time Zone

To display the correct local time for users, extensions must be set to the appropriate time zone.

4. Click the drop-down arrow and select a time zone for the extension.
5. Click **Save**.

3.7 Unassigned Devices

Contact us to activate unassigned devices

3.8 Music on Hold

Set preferences for Musing on Hold and upload custom auto file here.

Section 4: Enterprise Services Tab

This is the most advanced section of the Customer Administration Portal. Some of the options in this section affect the system as a whole and we encourage you to call our office before making changes if you are unsure. We are happy to assist you with any changes.

4.1.1 Auto Attendant

An automated recording that answers the phone and provides a personalized message to callers with options for connecting to the operator, dialing by name or extension, or connecting to up to nine configurable extensions (for example, 1 = Marketing, 2 = Sales, and so on). Configuration via the Customer Portal allows for hours of operation to be modified, with different options available for hours that the company is open or closed. Please contact our customer service if you would like to make changes and are unsure of the process.

4.1.2 Hunt Groups

Hunt groups allow an Administrator to distribute incoming calls to a central phone number to a specified group of users. An incoming call "hunts" for an available user within the group to answer it. There are several hunting policies and call policies administrators can configure when they add or modify a hunt group. In addition, Administrators can create Advanced Call Routing rules to set customized routing.

Hunting Policies

Circular: Incoming calls start the hunt with the user who is next on the list to receive a call (that is, the user who follows the last user scheduled to receive a call). When the end of the list is reached, the hunt circles back to the first user on the list. The hunt ends when an available user is found or all users have been tried.

- **Regular**: Incoming calls start the hunt with the first user on the list, then hunt sequentially until an available user is found or the end of the list is reached.
- **Simultaneous:** Incoming calls alert all available users in the group. The call is connected to the first user who answers the call.
- **Uniform:** Incoming calls are sent to the user who has been idle the longest.
- **Weighted:** Incoming calls alert agents according to the agent's relative weight. Agents with higher weights are assigned more incoming calls than agents with lower weights.

Call Policies

Connected Line Identification Privacy on Redirected Calls

Administrators can use Connected Line Identification Privacy on Redirected Calls to protect the privacy of the destination phone number receiving a redirected call. This allows a user who forwards a call to their home phone or cell phone to keep their personal number private and use their business number as their connected line identity. This service also applies to hunt groups, where the central extension assigned to the group can be presented as the connected line identity instead of the agent's individual extension.

Administrators can configure three different options for Connected Line Identification Privacy on Redirected Calls.

- **No Privacy**: This is the default value. The Connected Line Identification of the destination party is sent to the calling party.
- **Privacy for External Calls:** The Connected Line Identification of the destination party is presented only to internal callers. External callers see the Connected Line Identification of the redirecting party (for example, the central hunt group extension), not the destination number (for example, the user's individual extension).
- **Privacy for All Calls:** The Connected Line Identification of the destination party is never presented to callers. They always see only the Connected Line Identification of redirecting party (for example, the central hunt group extension).

Send Call Being Forwarded Response on Redirected Calls

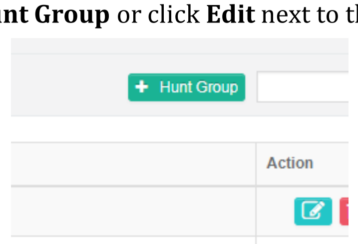
This policy controls whether the calling party receives a notification that their call is being forwarded by a user.

- **Never:** The calling party never receives any indication of their call being forwarded.
- **Internal Calls**: Only callers on the same PBX are notified.
- **All calls:** External callers are also notified either visually or audibly, depending on what type of device (phone) they have.

Note: The default is Never.

Add or Modify a Hunt Group

1. Click **Add Hunt Group** or click **Edit** next to the group to modify.



2. Enter or edit the Hunt Group Name, Caller ID First Name and Caller ID Last Name, as necessary.
3. (optional) Click the **Virtual Toll Free Number** drop-down arrow to select a number.
4. Click the **Hunting Policy** drop-down arrow and select a policy.
5. Scroll through the list of **Users/Extensions**. Highlight the users/extensions to add to the Hunt group and click . To remove a user/extension from the group, click .
6. If **Weighted Call Distribution** is selected, the **Edit** button becomes active. Click **Edi**t to assign weights to the users added to the hunt group.
   Note: The total combined weight must equal 100%.
7. Click **Browse** to upload a prerecorded greeting from your computer. To hear the greeting uploaded, click **Play**.
8. Enter a pass code for the hunt group's voicemail box.
9. Set the options for handling calls that are not answered. If **Forward call after waiting XX Seconds** is selected, enter a destination phone number for the call.
10. Select call policies for handling redirected calls.
11. Click **Save**.

Remove a Hunt Group

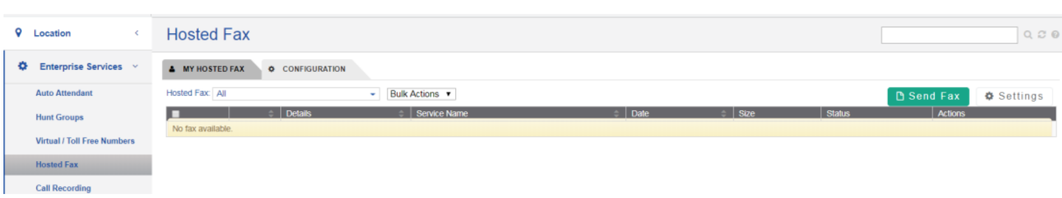
1. Find the hunt group to delete and click **Remove Hunt Group.**
2. When the confirmation message appears, click **Yes**.

4.1.3 Virtual/Toll Free Numbers

Local phone number with no services but includes unlimited incoming minutes. Contact our customer service to add numbers to your account.

4.1.4 Hosted Fax

Using Hosted Fax, you can send and receive faxes using your Customer Administration Portal or email. Manage your hosted fax here. NCTC cloudUC fax is available in two options depending on how many users within your company need this service:



- Personal Hosted Fax - assigned to one user and can be used like a personal fax machine.
- Shared Hosted Fax - assigned to multiple users and can be used like a company fax machine.

The following actions can be done from within the Customer Administration Portal:

- Configure Fax
- Manage Settings
- Send Fax
- View Fax

4.1.5 Configure Fax

The Configuration Tab within the Hosted Fax widget is an admin only option that allows administrators to view and manage all Hosted Fax accounts. To configure a Hosted Fax service:

- Browse down the list of faxes that are available
- Choose the one you want to configure
- Click Configure.

Configure Shared Hosted Fax

In the configuration window of a shared hosted fax, you can do the following:

1. Create a label. A meaningful label will help for quick identification.
2. Select if you want to store received faxes in the widget.

   Note: If you choose not to store fax in Customer Administration Portal, admins and users (with view and delete permissions) will need to change individual settings to allow faxes to be emailed directly to them. Please consider your company's email size restrictions when choosing this option.

3 Assign Users who can send fax from this account by selecting users from the dropdown box.

4 Manage individual service settings, determine who can
   a. Download and email from this fax number
   b. Delete faxes sent to this fax number
   c. Unassign a user

   Note: Make sure you save settings by clicking Save.

Configure Personal Hosted Fax

In the configuration window of the personal hosted fax, you can do the following:

1. Create a label. A meaningful label will help for quick identification.
2. Assign the user who can send faxes from this account.

Note: Once a user is assigned to a Personal Hosted Fax; they cannot be unassigned. Contact our office if this is a change that you need to make

4.1.6 Manage Settings

You can manage the outgoing and incoming settings of each fax (shared or personal) from within your Customer Administration Portal.

To change settings:

1. In the Hosted Fax dropdown, select the fax for which you want to change settings.
2. Click Settings.
3. You can edit the following outgoing fax settings

a. Select if you want to **Store sent faxes** in Hosted Fax Widget.

Note: Faxes stored in the Customer administration portal will be counted towards storage limit.

b. Select if you want to get an **Email when fax is successfully delivered.**

c. Select if you want to get an **Email when fax is not delivered.**

4. You can edit the following incoming fax settings
   a. Select if you want to **Store received faxes** in Hosted Fax Widget.
   b. Select if you want to **Email received faxes.**
   c. Select if you want to **Store and Email received faxes** in Hosted Fax Widget.
5. Click **Save**.

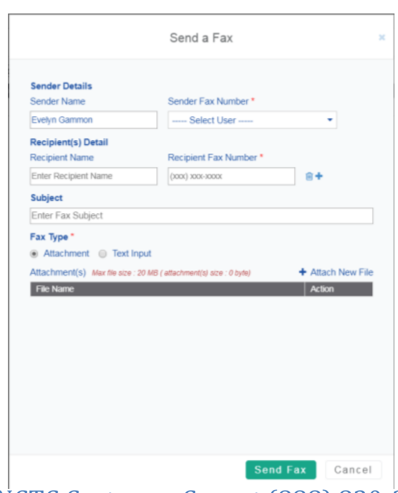
Note: You might not have all the options above. Contact your administrator for further information.

4.1.7 Send Fax

Sending Fax via Customer Administration Portal

Faxes can be easily sent through your Customer Administration Portal. This option allows you to see if your fax was sent immediately.

1. In the Hosted Fax widget, click on Send Fax. A box will pop up.
2. Your name will be automatically filled in the Sender Name box. Choose the Sender Fax Number (if applicable).
3. Enter the Recipient's name, and Recipient's Fax Number by filling the appropriate text boxes. Click + to add multiple recipients.
4. Enter a subject line for the fax.
5. Choose whether the fax content will be sent as an attachment or you will type out the text to be faxed.
   a. To attach a document, click the **+** button. You will be able to navigate through your desktop to find the document(s) you wish to send.
   b. To send text, type in the information.
6. Send fax by clicking the green Send Fax button on the lower right-hand corner.
7. Once the fax is sent, the Send Fax dialog closes and you will see the alert, "Fax Sent Successfully."
8. To confirm if the fax reached your recipient, check the status in the Status Column. You can also change your settings to receive an email when a fax is sent successfully or not.



Note: NCTC cloudUC Hosted Fax currently supports the following file types: PDF, TIFF, Doc. Total size of attachments cannot be greater than 20 MB

4.1.8 View Fax

To view faxes previously sent or received and stored within the Customer Administration Portal:

1. Click on the Other Services Tab. Locate the Hosted Fax widget. If necessary, you can expand the widget by clicking on the double arrow in the upper right-hand corner.
2. The following information is available for each file:
    a. Type: Incoming or Outgoing fax
    b. User (You)
    c. Details: Recipient or Sender of fax, Date, Time : fax was sent or received
    d. Status: Sent – Pending Delivery, Delivered, Failed
    e. Actions: , you can perform the following actions:
    f. Delete
    g. View
    h. Email
    i. Resend Fax

To email or delete multiple files from your storage:

1. Click on the small box next to the document icon within each file.
2. Click on all files you wish to perform the action on.
3. Click Actions in the lower left-hand corner of the widget.
4. Click Email, Download Delete.

If emailing, a box will appear to input the recipient's email address. If deleting, a box will appear for you to confirm the deletion,

4.2 Call Recording

Call Recording allows calls to be recorded automatically or on demand, and provides easy access to stored files in the web-based Customer Administration Portal.

Call Recordings Modes

Calls can be recorded in either Supervised or Unsupervised mode.

- Supervised - The company administrator have access to the recordings. Your access to supervised recordings is dependent on your configuration.
- Unsupervised (default mode) – only the user has access to the recordings.

NCTC cloudUC offers floating licenses that can be reassigned as needed, making call recording more economical for an organization. Administrators can Configure Services, Manage Settings, View your Recorded Calls and View Supervised Calls Configure Call Recording Services

Configure Users

The configuration tab of the Call Recording widget allows you to view/manage all of your Call Recording accounts. To configure Call Recording,

1. Browse down the list of call recording licenses that are available, to the one you want to configure, click Configure.
2. **Assign User** whose calls will be recorded.
3. Select the appropriate **Call Recording Mode** i.e., Never Record Calls, Record All Calls, and Selectively Record Calls.
4. Select the type of **Notification** you want i.e, Play Recorded Message, Repeat warning tone every 60 seconds.
5. Select if it is a Supervised Call Recording

Click **Save**

Note: Users who have been assigned supervised Call Recording will not have the ability to modify their Call Recording settings.

Manage Settings

You can easily set Call Recording preferences within the Call Recording widget for yourself or an employee you are supervising. You can edit your settings in My recordings tab and the settings of an employee you are supervising in Supervised Recordings tab. Select the appropriate User - DID from the dropdown and click on Settings.

Choose among the following settings:

- Call recording mode **- Never**, **Record All Calls** or **Selective Record Calls**.
- Automatically play recording notification and /or recording warning tone.

All recordings made using devices and applications associated with your assigned DID will be stored (based on settings) in your Customer Administration Portal.

View My Recorded Calls

All of your recorded calls are stored within the Call Recording widget in the My Recorded Calls tab.

Note: You may not be able to view some of the calls recorded in the supervised recording mode. Contact your administrator for further details.

To view a list of all your recorded calls:

6. Expand the Storage widget by clicking the double arrow icon in the upper right-hand corner of the widget.
7. Choose the DID for which the recordings are to be displayed.
8. The following information will be displayed for each file:
    a. User (You)
    b. Call Details (Direction of Call, Other User details)
        i. Date and Time when the call was recorded.
        ii. Duration of the recorded call
    c. Size
    d. Comments (if Applicable): This is the comment as provided by your supervisor(s) for the specific recording

   e. Ratings (if applicable): This is the rating provided by your supervisor for this specific recording
   f. Actions: Actions applicable to the specific call Recording.
9. You can perform the following actions on individual files:
   a. Play
   b. Download
   c. Email
   d. Delete

To email, download or delete multiple files from your storage:

1. Click on the little box located on the right side of the row corresponding to each file.
2. Click all files you wish to email or delete.
3. Click "Bulk Actions" in the lower left-hand corner of the widget.
4. Click "Email" or "Delete" or "Download"
   a. If emailing, input the recipient's email address.
   b. If deleting, confirm the deletion.
   c. If downloading, a download link will be sent automatically to your email address.

View Supervised Calls

If you have chosen the supervised recording mode for any user, you will be able to view all stored supervised recordings. You can perform the following actions within the Customer Administration Portal:

- View Supervised Recordings
- Filter Supervised Recordings

View Supervised Recordings

To view a list of all supervised recordings:

1. Expand the Call Recording widget by clicking the double arrow icon in the upper right-hand corner of the widget.
2. Click on the Supervised Recordings tab.
3. Select a DID from the Dropdown box to view recordings related to a particular employee.
4. The following information will be displayed for each file:
   a. User whose call was recorded.
   b. Call Details (Direction of Call, Other user details)
   c. Date and Time when the call was recorded.
   d. Duration of the recorded call.
   e. Size of the recorded file.
   f. Comments (if Applicable): Comment made on recording. You can add/edit Comments by clicking the add/edit comments link.
   g. Ratings (if applicable): Rating made on recording. You can rate a call by simply clicking the appropriate star.

    h. Actions: Actions applicable to the specific recording.
5. You can perform the following actions on individual files:
    a. Play
    b. Download
    c. Email
    d. Delete

To email, or delete multiple files from your storage:

1. Click on the little box located on the right side of the row corresponding to each file.
2. Click all files you wish to email or delete.
3. Click "Bulk Actions" in the lower left-hand corner of the widget.
4. Click "Email" or "Delete" or "Download"
    a. If emailing, input the recipient's email address.
    b. If deleting, confirm the deletion.
    c. If downloading, a download link will be sent automatically to your email address.

Filter Supervised Recordings

To view files stored based on certain criteria:

6. Click on the Filter button on the top right-hand corner.
7. Click on the calendar to enter time frame of the recordings you wish to view:
8. Type in the name of user whose recordings you are trying to search.
9. Type in the phone number of user whose recordings you are trying to search.
10. Select Rating (if applicable).
11. Click Filter.
12. The files matching the filter criteria will be displayed.

4.3 Storage

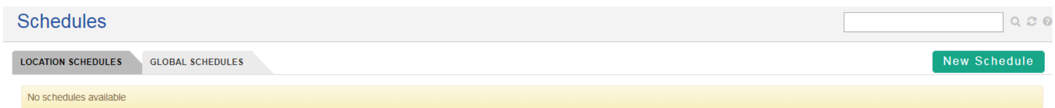
1 GB of total system storage is available for every Hosted Fax and Call Recording license added to your phone system. For information on how to send electronic faxes via Hosted Fax, see Hosted Fax.

> **Note:** If your total used storage exceeds the available storage limit, the organization may incur additional storage fees.

4.3.1 View Total Storage Available/Used by the Company

This tab provides information on usage and total available storage for the company and each individual user. The total storage available is shared within your company and is not restricted to a particular service or user.

4.3.2 View the Storage Used by an Individual Service



You can view the storage used by each Hosted Fax and Call Recording license added to your phone system. The following information is displayed for the individual services:

- Label, Status of service
- Assigned Users: If multiple users are/were assigned to a single service, they will all be listed under the Assigned Users column.
- Storage Space Used

4.4 SIP Trunking

Not used at this time.

4.5 Conference Bridge

Non-overlapping conferences with 15 participants per conference. Includes on local dial-in number, conference access # and a moderator pin. This tab shows current assigned seats, their Conference ID number, and their Moderator Pin. This feature is available with the executive license only. Contact our customer service to add this service to your account.

4.6 Virtual Extensions/Mailbox

This tab show the virtual extensions/mailboxes assigned to your account.

Virtual extensions allow external numbers to be integrated into the extension dialing plan. For example, a virtual extension can be assigned to a mobile employee who frequently uses their cell phone for business. Callers who dial the employee's virtual extension are automatically forwarded to the person's cell phone.

Virtual extensions can also be used to route callers to recorded announcements such as the company's standard hours of operation so that users do not have to answer those calls.

4.7 Schedules

Administrators can use the Schedules Tab to create and manage existing schedules. Schedules can be used by Administrators in various areas within the Customer Administration Portal, including with Auto Attendants, Hunt Groups and Call Center queues. Schedules can be built once, then used among all these services. For example, a schedule for Business Hours can be created which can also be used for Hunt Groups. If the Business Hours change, only the Schedule needs to be updated, and all

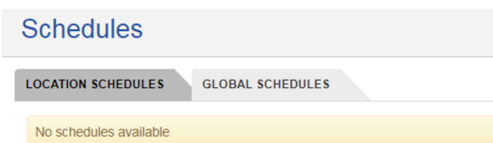
4.7.1 Global/Location Schedules

Schedules can be created as Global or Location schedules. This is mainly an organizational convenience. The default tab is the Global Schedules tab. Most schedules will be created in this tab. If an Administrator wants to create a schedule that is to be used with a specific location, this schedule can be created in the Location Schedules tab. However, when using schedules, all schedules will be available to be used in any queue, regardless of location.

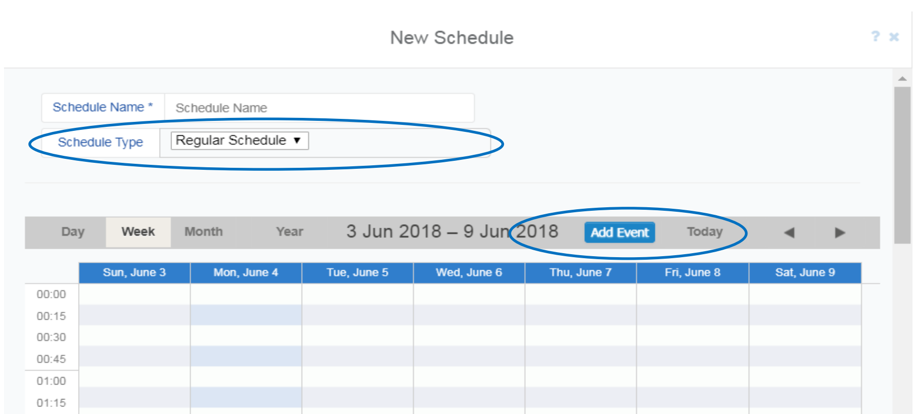
If all locations use the same set of hours, it is not necessary to create a Business Hours schedule for each location. This is because any Time Zone setting is set in the specific service using the schedule, and not in the schedule itself.

4.7.2 Creating, Editing and Deleting Schedules

Administrators can create new schedules.

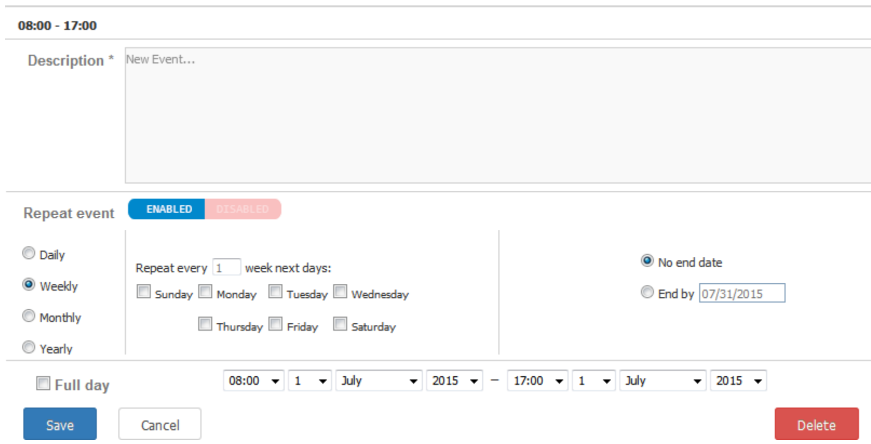


1. The New Schedule dialog uses a standard calendar view.
2. Enter a name, such as Business Hours, in the **Schedule Name** field.

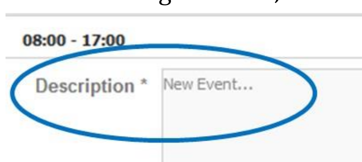


3. Choose a **Schedule Type** from the drop-down list. A **Regular Schedule** is a standard schedule. A **Holiday Schedule** is used for any holiday type schedules and must be tagged this way.
4. Click **Add Event** 

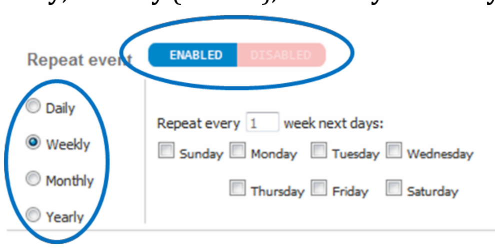
to add a new event to a schedule. As a second editing option, **Left-click** on a specific day and time in the calendar view and begin dragging down the screen. When the mouse button is released, the new event dialog will be displayed, along with the selected start and end times. As a third option, **double-click** on any day/time in the calendar view to bring up the new event dialog with that day and time set as the starting day and time.



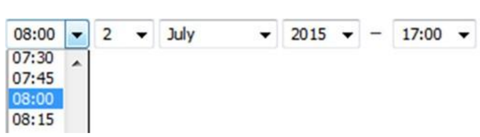
5. A schedule can contain multiple events. For example, an After Hours schedule could contain an event spanning 12:00 a.m. to 8:00 a.m. weekly, a second event spanning 5:00 p.m. to 12:00 p.m. weekly, and a third event covering the full day for both days of the weekend.
6. When creating an event, each event must be named. Enter the name in the **Description** field.



7. Events can be repeating events or single events. By default, the repeating options are enabled. If you want a single event, click the red **Disabled** button to collapse the repeating options. Different repeating options are available, depending on whether the event repeats **Daily**, **Weekly** (default), **Monthly** or **Yearly**.



8. Choose the proper start and end times for this event. If the event is using any repeating option, the end day does not matter. The end day is only used for non-repeating events. The beginning day is used to choose when this event should start. For example, the event below

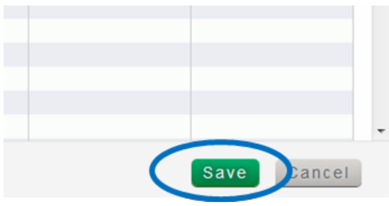


would start repeating on July 2nd.

9. If this event is a full day event, click the **Full day** check box instead of setting start and end times.

10. Click **Save** to save this event, **Cancel** to cancel creating this event,or **Delete** if this is an existing event you want to delete from a schedule.
11. To add additional events, click **New Event** again and create another event.

12. When all events have been added to this schedule, Click **Save** in the **New Schedule** dialog.

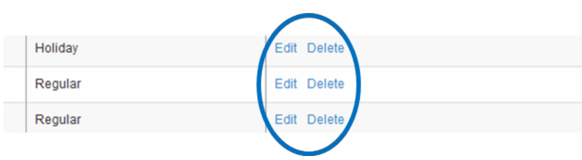


13. The schedule dialog also supports **Day**, **Week**, **Month** and **Year** views. Choose the view you want from the tab in the date bar on the schedule. Use the arrows on the right to move to the

next Day, Week, Month or Year, depending on the view.

14. Creating events for a Holiday schedule is easier to do in the Year view. Click **New Schedule**, choose **Holiday Schedule**, then choose **Year** from the tab. Double-click on any day to create an event on that day. By default, the **Full Day** option will be checked. Multiple days can be added to the schedule.

15. Once a schedule exists in the Schedules Widget, the schedule can be modified by clicking **Edit** or **Delete**.



16. If a schedule is in use, any attempt to delete the schedule will fail. Anything using this schedule must first be modified to not reference the schedule before it can be deleted.

4.8 Receptionist

If a Receptionist Console has been purchased, a Receptionist tab will provide the ability to configure monitored contacts for Receptionist users.

4.8.1 Configure the Receptionist Client

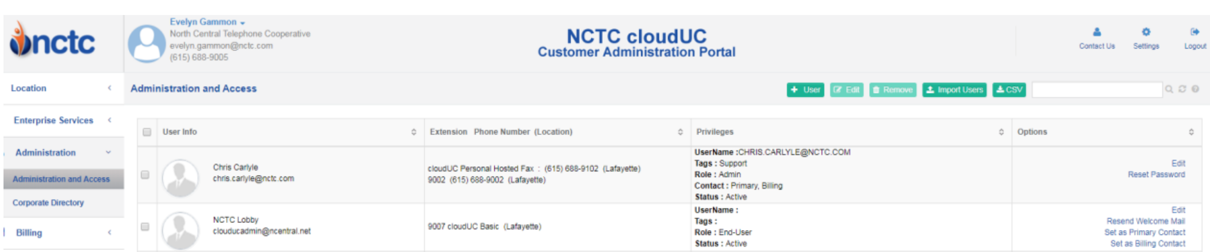
Edit a user's client configuration by selecting users to monitor (see line status) by default.

1. Locate the user whose configuration you want to edit and click in the Actions column.
2. The Edit Receptionist Profile dialog box will open. Scroll or search to find the user that you want to monitor.
3. To move a user into the monitored group, click to highlight their name in the left pane and click .
4. To remove a user from the monitored group, click to highlight their name in the right pane and click .
5. Click Save.
6. To reassign the receptionist client to another user, click
7. To remove receptionist client access for a particular user, click

4.9 Key System Emulation

This is an advanced feature that we can set up for you. This allows your system to behave more like a Key/PBX system. This is an advance feature that is available but seldom used. Please contact our office before setting this up or making changes to an existing program.

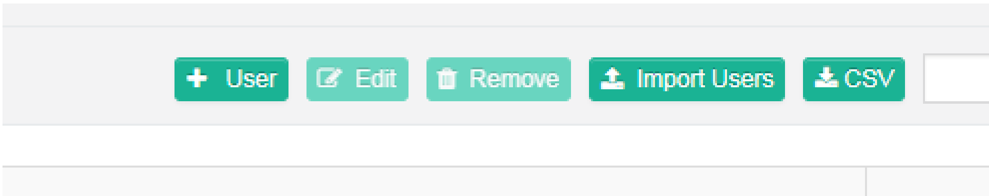
Section 5: Administration Tab



5.1 Administration and Access

Administrators can add users, download user details as CSV files, remove users, edit user settings and reset passwords.

Use the buttons on the top of the screen to manage users and their functions.



5.1.1 Add Users

1. Click **Add User**.
2. Enter the user's name and email address.
3. Scroll through the list of **Tags**. Highlight the tags to add to the user's profile and click . To remove a tag from the profile, click .
4. (optional) If a tag does not appear in the list, enter it in the box provided and click **New Tag.**
5. Click the **Role** drop-down arrow and select either **Admin** or **End User**.
6. If adding only one user, click **Create User**. If adding multiple users, click **Create User and Add Another**.

5.1.2 Download User Details as CSV

Export the user information displayed in Administration and Access widget to an Excel worksheet for viewing, sorting and printing.

1. Click **Download as CSV**.
2. When the confirmation message appears, click **Yes**.
3. Open the Excel worksheet.

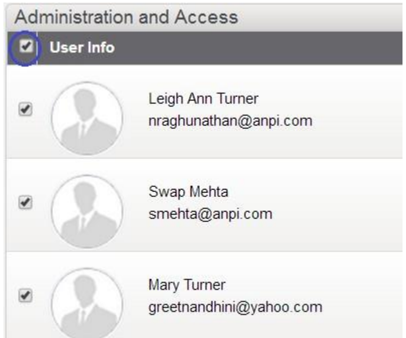
5.1.3 Remove Users

1. Check the box next the user's name.
2. Click **Remove**.
3. When the confirmation dialog appears, click **Yes**.

5.1.4 Edit User Settings

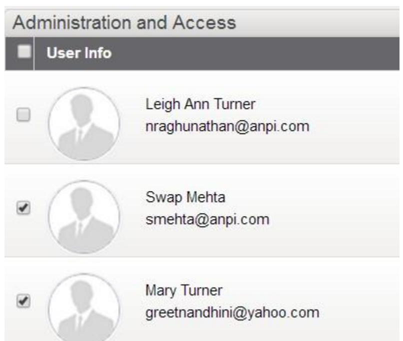
Administrators can edit settings for individual users and multiple users.

1. To edit an individual user's settings, locate the username and click **Edit**.
2. To edit settings for multiple users, check the box on the menu bar. All users below it are automatically selected.



OR

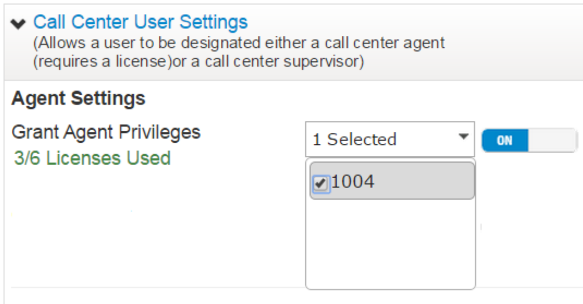
To select particular users, check the boxes next to their usernames.



3. Click **Edit** at the top of the screen.
4. Edit the user’s name and email address, if applicable.
5. Scroll through the list of **Tags**. Highlight any you want to add to the user’s profile and click . To remove labels from the profile, click .
6. (optional) To add a tag that does not appear in the list, enter it in the box provided and click **New Tag.**
7. To modify the user’s permissions, click the **Role** drop-down arrow and select either **Admin** or **End User**.
8. If applicable, select **Call Center User Settings**.

Note: These settings are only available if call center services were purchased. In addition, licenses must be available to designate users as call center agents; users can be designated as call center supervisors without requiring a license. To purchase call center services and licenses, contact NCTC.

a. 3To **Grant Agent Privileges** (i.e., to pair an extension or phone number with the agent’s license), change the **Off** setting to **On** and select an extension number for the agent. The number of **Licenses Used** increases by 1.



b. To **Grant Agent Client Access** (i.e., to give agents access to a web-based user interface), change the **Off** setting to **On** and select an extension number for the agent. The number of **Licenses Used** Increases by 1. Agents can now use the online client interface for the call center.

> **Note:** The agent's login URL and username/password are sent to them via email.

c. To **Grant Supervisor Privileges** (i.e., to enable the user to modify call center queues and view call center statistics), change the **Off** setting to **On** and select an extension number for the supervisor. This also grants the supervisor access to the online client interface for the call center.

> **Note:** In many call centers, supervisors also function as agents, especially during peak times or when hold times exceed SLAs. To enable a supervisor to serve as an agent, you must grant them agent privileges (see steps a and b), which requires a license, in addition to granting them supervisor privileges.

d. (optional) Select an **Agent Threshold Profile** by clicking the drop-down arrow and choosing a profile.

> **Note:** The call center has the option of setting "Yellow" and "Red" threshold values for a set of agent-related metrics. When these thresholds are crossed, the severity is rendered visually on the supervisor's Dashboard client. Email notifications may also be sent to addresses included in the profile. Profiles are set up in Call Center Settings.

9. If applicable, select **Receptionist**.
Note: These settings are only available if cloudUC Receptionist services were purchased.

10. To **Grant Receptionist Client Access** (i.e., to pair an extension or phone number with the a Receptionist license), change the **Off** setting to **On** and select an extension number for the agent. The number of **Licenses Used** increases by 1.

11. If editing multiple user settings, click **Next User** and **Previous User** to cycle through the users you selected.

12. Click **Save.**

5.1.5 Reset Passwords

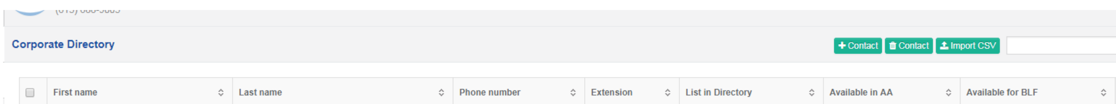
Administrators can reset passwords for users who have forgotten the answers to their security questions.

1. Locate the user's name and click **Reset Password**.

2. A dialog box appears asking whether you want the user to receive an email to reset their password. Click **Yes**.
3. Another dialog box appears confirming that an email has been sent to the user. Click **Close**.

5.2 Corporate Directory

Your corporate directory will list everyone in your system. In addition to your phone system, you may add other contacts that will be available on the corporate level. You have the option of entering individually or by importing a CSV file. Use the green buttons at the top of the screen to add or delete



contact from you corporate directory.

Section 6:   Billing Tab

Billing is handled through our NCTC invoicing system. Please contact if you have any questions regarding your billing. 615-666-2151 or 888-830-3091.

Section 7: Reporting Tab

7.1 Call Log

The Call Log displays information about incoming and outgoing calls. These records may be downloaded to CSV file using the green (CSV) button at the top of the page.