

Smithville Cloud Voice

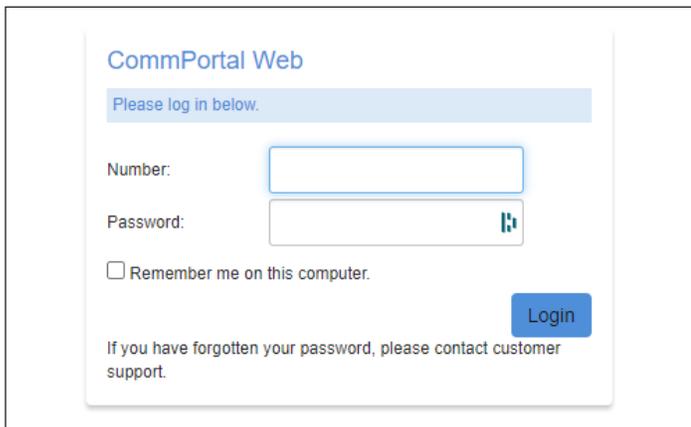
CommPortal Business Group Administrator (BGA) User Guide (CLEC)

Welcome to Smithville Cloud Voice!

As the designated Business Group Administrator (BGA) for your company's Cloud Voice service, you have full administration privileges to manage just about every aspect of the service. Smithville representatives built the service initially, but all new changes can be completed in-house by you. You not only have the capability to access and manage how all of your company's calls are handled and routed, you also have the ability to manage all user accounts and lines that are operating within the Cloud Voice Service.

This guide will walk you through all aspects of the BGA controls. For further details at any time, we recommend the "HELP" feature within the *CommPortal* for additional assistance.

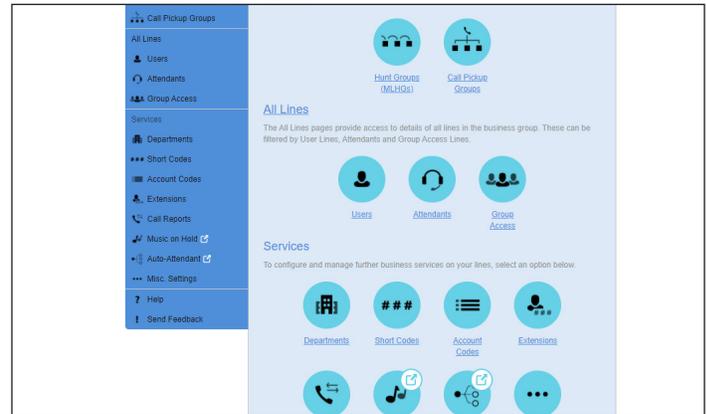
To begin, log into the Business Group Administrator account at commportal.smithville.com.



In the **Number** field, enter the ten-digit telephone number you have been assigned.

In the **Password** field, enter the password that Smithville provided. After your first login, you will be prompted to change this password to a unique password of your choosing. Please be sure to keep this log in information private. Again, this is the account that can manage every aspect of the new Cloud Voice service.

Every time you log in, you will see the same main controls screen.



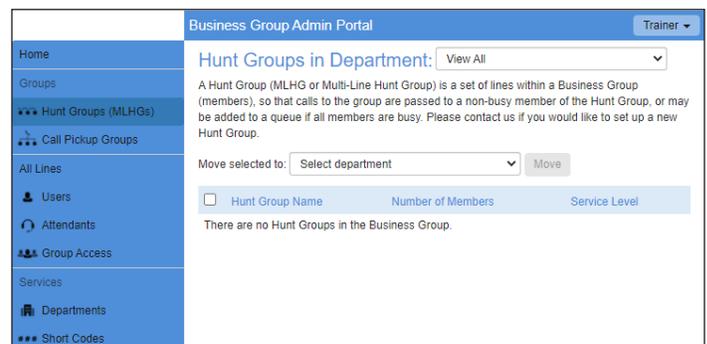
This guide will walk you through each module.

All of your business telephone numbers will be referred to as the Business Group (BG) throughout this guide.

**This Guide is representative and may vary from your individual CommPortal screen.*

Hunt Groups

Hunt Groups are a set of lines set up within the Business Group so that incoming business calls can be passed to a non-busy number as assigned. These controls will be setup directly by Smithville when your service is initially provisioned. As BGA, you are able to manage and alter these **Hunt Groups** going forward.



A **Hunt Group** can be setup so that when a call is sent to a Business Group, the call is passed to an available member(s) and keeps passing to available member(s) until someone answers the call.



Call Distribution within the *Hunt Group* can be one of the following:

Linear—if a *Pilot Number* is called, hunting starts with the first member and continues through the list until a non-busy line is found. If a busy member is dialed directly and the *Hunt on Direct Dialed Calls* option is set to true, hunting starts with the member after the dialed number and continues to the end of the list until a non-busy line is found. It does not start again from the beginning of the list.

Circular—if a *Pilot Number* is called and busy, this set up is the same as Linear, except that once the end of the list is reached, hunting will continue from the beginning of the list until a non-busy line is found.

Uniform (round robin)—if a *Pilot Number* is called, hunting starts with the first number after the line that was selected by the previous hunt. When the end of the list is reached, hunting continues from the beginning of the list until it reaches the number it started with. If a busy member is dialed directly, and *Hunt on Direct Dialed Calls* is set to true, this is the same as Circular hunting.

Uniform (longest idle)—if a *Pilot Number* is called, or a busy member is dialed directly and *Hunt on Direct Dialed Calls* is set to true, hunting starts with the member that has been idle for the longest. The idle time for a Line is calculated using the end time of any incoming or outgoing calls to or from the Line, not just those allocated by hunting. When a member disables the *Do Not Disturb call service*, its idle time is reset to zero.

Maximum Queue Length—is the maximum number of calls that can be queued at one time. If queuing is not supported or the queue is already full, the caller will receive the treatment specified by the Pilot or Direct Dial number that was called.

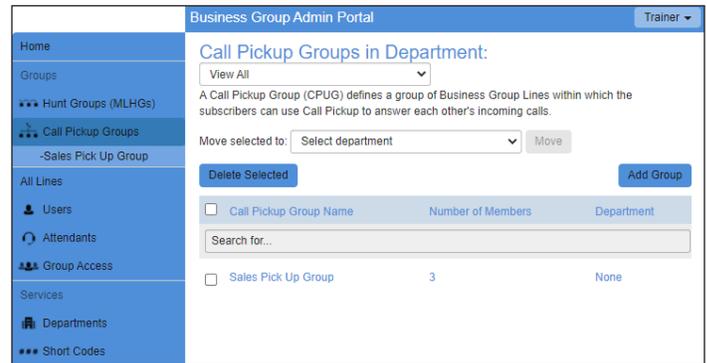
Is line hunting applied to direct-dialed calls? This setting specifies whether external calls directly to a line within the *Multi Line Hunt Group* receive Line Hunting treatment if the line is busy. (Intercom calls, and external calls directly to a line with *SIP Call Forking* enabled, do not receive Line Hunting treatment regardless of the setting of this field.)

Is the Pilot’s information delivered as Caller ID?

This setting specifies whether the *Pilot* that was called should be delivered as the caller ID. This can be used so that, for example, a helpdesk receiving calls could know whether the *Helpdesk* or *Accounts Inquiries* number had been called.

Call Pickup Groups

Call Pickup Groups allow you to define groups of people who can each answer calls that come in to that defined Pickup Group. You can create groups and manage them here.



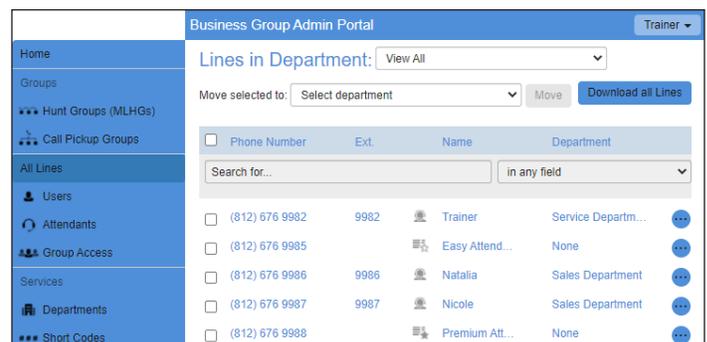
All Lines

All Lines show all allocated *User lines*, *Sim-Ring Groups (MADNs)*, *Hunt Group Pilots* and *Attendants* set up for your company. Additionally, the visible list may be filtered by selecting the *Users*, *Attendants* and *Groups* navigator links.

User lines correspond to particular people within the Business Group. **If your Business Group is across different telephone exchange areas, you may need to refer to the BGA User Guide Addendum.**

Attendants list the automated receptionist aligned with your account that can provide call routing services for when calls are received by your main external Business Group number.

Simultaneous Ring and *Hunt Groups* allow callers to find an available user without having to ring them individually.



Actions—for each line, this button allows you to:

- View the Hunt Group or Sim-Ring Group configuration.
- View the line (including attendant) configuration.
- Reset a line.

- Unlock an account. If the account was not locked, nothing will happen.

Reset a Line—you will be asked for some new properties for the line.

New account name—the server may reject some special characters and names that are too long or short.

Resetting an account will permanently lose all its settings including saved messages and contacts. Please take extra care when performing this operation.

After successfully resetting the account another popup will display the new user details, which may include the following:

- Telephone Number
- Account Name
- Account Password
- Voicemail PIN
- Call Services PIN

These user details will be preselected and can be easily copied and pasted wherever required. The account name, password and PIN can be changed afterwards in the **Settings** page, via the **View individual settings** action.

Download all Line—to download information for all lines in the Business Group, click Download all Lines. The information will be downloaded to a CSV file and will contain, for each line:

- Department Name
- Name
- Directory Number

Users

Users show all company users.

Phone Number	Ext.	Name	Department
(812) 676 9982	9982	Trainer	Service Departm...
(812) 676 9986	9986	Natalia	Sales Department
(812) 676 9987	9987	Nicole	Sales Department
(812) 676 9989	9989	Brad	Sales Department
(812) 676 9992	9992	Matt	Sales Department

Attendants

Attendants lists the Auto Attendant that has been set up for your company.

Phone Number	Ext.	Name	Department
(812) 676 9985		Easy Attend...	None
(812) 676 9988		Premium Att...	None

Group Access

Group Access can further be divided into subgroups within departments.

There are no groups in the Business Group.

Departments

Departments allows you to divide your organization into Business Groups and manage their calls respectfully.

Department Name	Operator Number
Sales Department	- - -
Service Department	- - -

The **Departments** page shows all departments.

Departments divide your Business group into separately-administrable groups. **Business Group Administrators** can optionally be restricted so that they only have privileges to administer lines within a given Department (and its sub-departments). Departments may be divided into sub-departments.

Lines, Attendants, Groups, Phones or Short Codes can all be placed into a department (or in the top-level Business Group-wide department) and moved between departments in the pages relating to each of those items.

Department Configuration—each row in the table shows the Department name and call limits. Department names are indented to show their hierarchy.

When deleting a Department, ensure that the Department is empty of Lines, Call Pickup Groups, Short Codes and other Departments—Departments can't be deleted unless they are empty. Lines, Phones, Groups or Short Codes, can be deleted or moved into other Departments. Sub departments must be deleted.

Call Limits—control how many calls are permitted into and out of a department. The call limits you set for a particular department apply to that part of the department *tree*—a department and all departments below it. Calls within that part of the tree—within the department, or between two sub-departments—do not count toward these limits, but calls to or from departments elsewhere in the business group or outside of the business group are counted. Make sure you set this limit high enough to account for all the departments below this one.

Three different types of limits can be specified.

1. **Incoming and Outgoing**—this limits the total number of calls into and out of the department or its sub-departments.
2. **Incoming**—This limits the number of calls into this department or its sub-departments.
3. **Outgoing**—This limits the number of calls out of this department or its sub-departments.

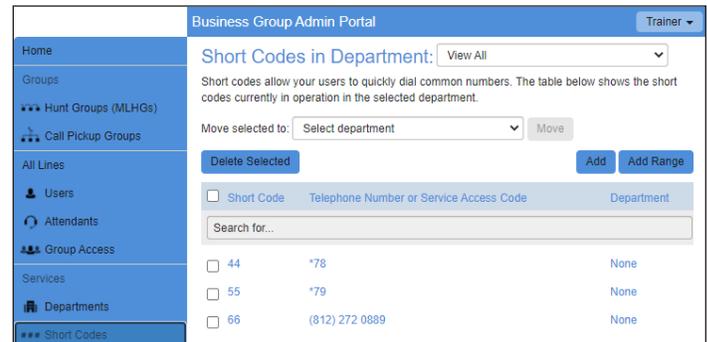
For each type of limit, calls can be:

- Blocked, meaning that no calls are permitted
- Limited to a specific number of calls
- Unlimited, meaning that any number of calls are permitted for this department and its sub-departments, although calls may still be restricted by limits set on a department higher or lower in the tree.

Short Codes

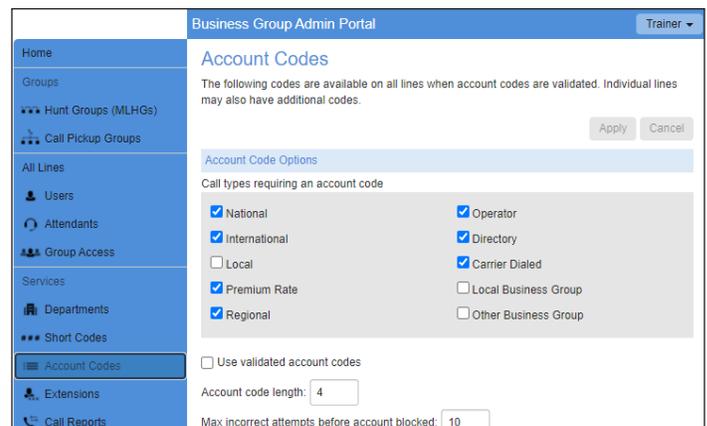
Short Codes are a code specific to the Business Group or department that represents a (usually) external directory number or another code that can only be dialed within the Business Group or department (for example a Call Service access code).

Short Codes may be either a single code or a range of codes. The telephone number or service access code that the **Short Code** maps to may be blank if not assigned yet. **Service Access Codes** consist of a string of digits and may optionally start with a * or #.



Account Codes

Account Codes are used to limit/restrict certain dialing patterns for internal and external calls.



Configuration for the Business Group—this configuration applies to all lines in the Business Group. You can configure which types of outbound calls (e.g. local, national or international) will require the end-user to enter an account code, and you can also choose whether you require end-user account codes to be validated or not.

- If account codes are validated then you define a set of permitted account codes, and the end-user must dial a code from this list whenever they place an outbound call (if it is a type you have specified you wish to log account codes for). If the end-user dials an account code that does not match one of this list more than a configured number of times, then their account will be blocked, and will need to be unblocked before they can place any more calls that require account codes.
- If account codes are not validated then you do not preconfigure a set of permitted account codes. When an end-user places an outbound call (of a type you have specified you wish to log account codes for) they may dial any code of their choosing.

This service cannot be enabled or disabled at a global level. It is enabled or disabled per outbound call type by configuring which types of outbound calls you wish to log account codes for.

You must configure the following information in order to use this service.

- Call types requiring an account code—select the check-boxes for the call types that you wish to log account codes for. If you select a call type, whenever the end-user places a call of this type they will be required to enter an account code. If they do not select a call type then they cannot log account codes when placing this type of call.
- Account code length.
- Use validated account codes. See description above.

If you are using validated account codes, then you must also configure some Assigned Account Codes. This is the list of account codes that you have preconfigured. When placing an outbound call that requires account codes, you must dial one of these codes. To edit this list, click the Edit List button to bring up the manage assigned account codes overlay.

Configuration for each Business Group Line—you can set the following options to allow an individual Business Group Line to override any of the Business Group Account Codes configuration.

Call types may be overridden per line. Set this check-box to allow Business Group Lines in this group to use a different set of call types from the Business Group.

Account code length may be overridden per line. Set this check-box to allow Business Group Lines in this group to use Account Codes with a different length to the Business Group. If a different length is configured than any validated account codes defined for the group do not apply to the line.

Lines may view Business Group Account Codes. Set this check-box to allow Business Group Lines in this group to view the list of validated Account Codes for the group.

Business Group Lines can be configured so that:

- The Line can view, but not change their own account codes.
- The Line can view and change their own account codes.
- The Line cannot view or change their own account codes.

Extensions

Extensions can be set up to be used to quickly dial other numbers in the Business Group.

Ext.	Telephone Number
<input type="checkbox"/>	9982 (812) 676 9982
<input type="checkbox"/>	9986 (812) 676 9986
<input type="checkbox"/>	9987 (812) 676 9987
<input type="checkbox"/>	9989 (812) 676 9989
<input type="checkbox"/>	9992 (812) 676 9992
<input type="checkbox"/>	9993 (812) 676 9993
<input type="checkbox"/>	9995 (812) 676 9995

Smithville will align these extensions initially.

Call Reports

Call Reports allow you to download a report of all calls made to or from lines in your Business Group or a particular department.

Once you have downloaded the report, you can open it in a spreadsheet application such as *Microsoft Excel*[®]. The report includes all details of calls coming in and out of your Business Group; including:

- Date and time that the call was made.
- Whether the call was between two lines in your Business Group, from an external line into your Business Group or from a line in your Business Group to an external line.
- The calling number, and its extension and department if applicable.
- The called number, and its extension and department if applicable.
- Whether the call was answered.
- The length of the call.
- How long the caller was waiting for the call to be answered.
- Any account and carrier codes that were dialed to make the call.
- Note that if you filter on department and your department was recently renamed, you will only see calls that were made since the renaming.

Music on Hold (MOH)

Music on Hold (MOH) allows you to choose from four (4) prerecorded music tracks or none. These settings can be global or by specific numbers within the Business Group. **MOH** has many settings that can be modified, such as:

- **Specific Premium User Directory Numbers or Global default settings**
- **Initial Resource**
 - Default Beeps (15 Seconds)
 - Nashville (155 Seconds)
 - Oceanside (235 Seconds)
 - Classico (205 Seconds)
- **Actions**
 - Repeat
 - Play Once
 - Repeat- Initial Interrupted
 - Repeat- Follow-up Interrupted
- **Follow-Up Resource**
 - Default Beeps
 - Nashville
 - Oceanside
 - Classico
- **Start Point**
 - Start
 - Random
- **Duration**

When a repeat action is selected, this setting will allow you to set a duration for the length of time in which the recording repeats.”

Keep in mind that you can also upload your own music or recordings to MOH. TIP: Play company advertisements for your callers to hear while they wait.

Note: Smithville's service **will not allow copyrighted audio** to be used within your MOH account. If discovered, Smithville will ask for the audio to be removed immediately.

Misc. Settings

Number Blocks—for easy reference, all defined directory numbers under your Business Group Lines are defined here. You can use this to help identify unallocated available service numbers.

External Calls—each call type can have the following limits. Note, external call limits apply to the total number of incoming and outgoing calls.

- Unlimited.
- Limited. In this case the maximum number of external calls is also shown.
- Not permitted.

Your default carriers for making calls are shown. Note, these may be overridden on per line and/or per call.

Call Notifications—only administrators of the whole Business Group can enable or disable Emergency Callers. Only the departments that have at least one Emergency Contact configured are listed.

Other Settings—restricted Subscriber Messaging prevents the forwarding of voicemail messages to subscribers outside of the business group. This applies to the whole business group.

Internal Operator Number sets the default operator number for the whole business group. This may be overridden for individual departments.

Having Trouble? Need Assistance?

With Smithville Assist, you'll receive top-notch assistance from our in-house technicians to help manage and operate your *CommPortal* when you need it. You simply state how you would like your Cloud Voice system to function and the Smithville Assist Team will make it happen.

Smithville Assist - Unlimited is available at an all-encompassing additional rate of **\$17/mo. per seat**, or you can use **Smithville Assist - As You Need It** on a per Phone Call basis for **\$45/half hour**.

Call us at (800) 742-4084 to take advantage of Smithville Assist.