



# User Guide: Getting Started

# Contents

1. **Getting Started**
2. **The Manager Portal**
  - 2.1 Accessing the Manager Portal
  - 2.2 Logging In
3. **Homepage Layout**
  - 3.1 The Attendant Console
  - 3.2 Dynamic Call Parking
  - 3.3 Contacts Tab
  - 3.4 Call Queues Tab
  - 3.5 Auto Attendants Tab
  - 3.6 Widgets on Homepage
    - 3.6.1 New Voicemail Messages Panel
    - 3.6.2 Recent Call History Panel
    - 3.6.3 Active Answering Rule Panel
    - 3.6.4 Active Phones Panel
    - 3.6.5 Navigation Options
4. **Profile**
  - 4.1 Directory Options
  - 4.2 Announce in Audio Directory
  - 4.3 List in Directory
  - 4.4 Caller ID Information
  - 4.5 Change Account Security
  - 4.6 Email Address
  - 4.7 New Password
  - 4.8 Current Password
  - 4.9 Change PIN

# 1 Getting Started

Welcome to your new unified communications account! Your account on this system will allow you to make calls, receive voicemails, chat with other users in the organization and much more.

This document is designed to help teach you how to navigate to the Manager Portal, a web interface that allows you to access and control your account.

We will then break down the Manager Portal homepage, the application navigation icons, the configuration options for them, and how they change the behavior of the application.

Finally, we will discuss how to use those applications in a real-world use case scenario, so you understand what the applications do, the configuration options that control the behavior of the application, and how to apply your knowledge to configure the application to meet your specific needs.

## 2. The Manager Portal

### 2.1 Accessing the Manager Portal

To manage your account, you will use the Manager Portal. A web interface that allows you to easily communicate with others and manage your account settings. In order to access the Manager Portal, open a web browser and enter your fully qualified domain provided by your administrator into your web browser as seen in figure 2.1.a.

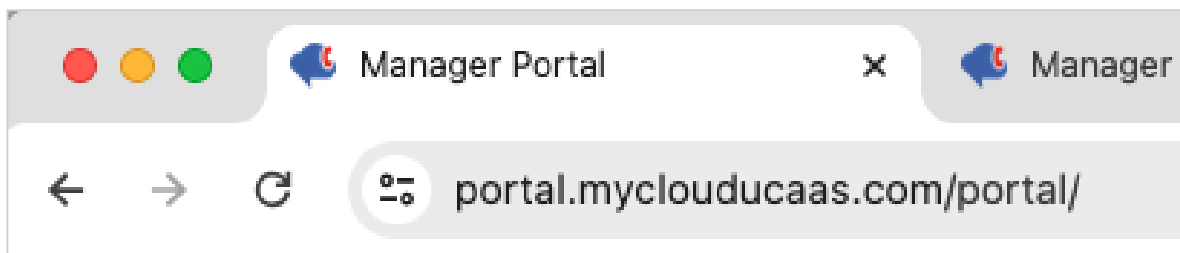
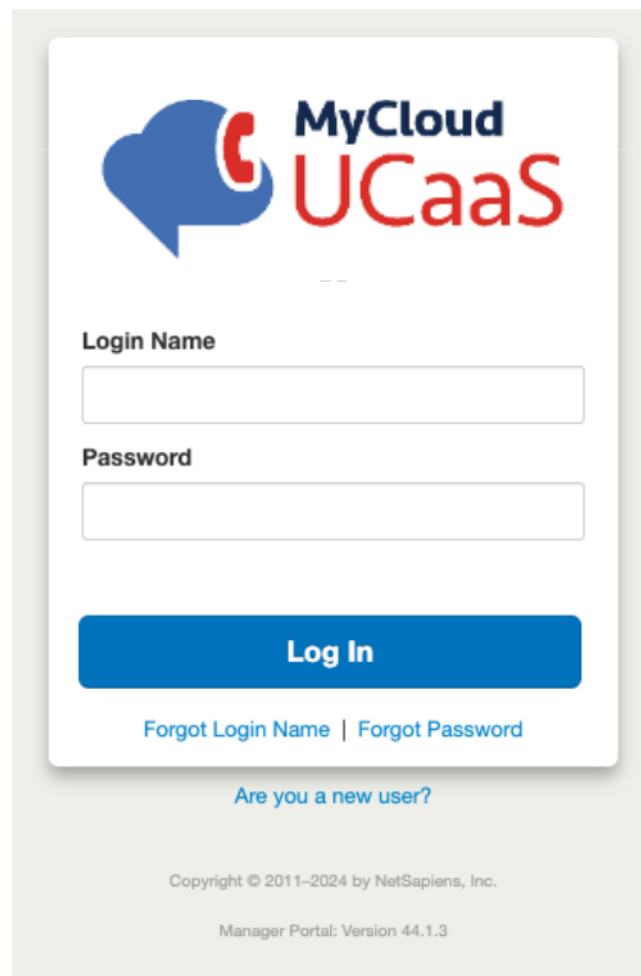


Figure 2.1.a

## 2.2 Logging In

After entering the domain into your browser, you will be taken to the login page as seen in figure 2.2.a. On the login page, enter your credentials provided by your administrator or click the New User link. Then enter your email and extension number and your credentials will be emailed to you.

After entering your credentials, you are taken to the homepage of your Manager Portal account as seen in figure 3.1.a.



The image shows a login page for MyCloud UCaaS. At the top left is a logo consisting of a blue speech bubble with a red telephone handset inside. To the right of the logo, the text "MyCloud" is in blue and "UCaaS" is in red. Below the logo and text, there are two input fields: the first is labeled "Login Name" and the second is labeled "Password". Below these fields is a large blue button with the text "Log In" in white. Underneath the button, there are two links: "Forgot Login Name" and "Forgot Password", separated by a vertical bar. At the bottom of the page, there is a link "Are you a new user?". At the very bottom, there is a copyright notice: "Copyright © 2011–2024 by NetSapiens, Inc." and "Manager Portal: Version 44.1.3".

Figure 2.2.a

### 3. Homepage Layout

The screenshot displays the MyCloud UCaaS homepage. At the top left is the logo, and at the top right is the user profile 'Demo User 1 (200)'. A navigation bar contains icons for Home, Messages (with a red '3' notification), Contacts, Answering Rules, Time Frames, Phones, Music on Hold, and Call History. The main content area is titled 'Home' and features three primary sections: 'NEW VOICEMAIL MESSAGES', 'RECENT CALL HISTORY', and 'ACTIVE ANSWERING RULE'. The 'ACTIVE PHONES' section shows no active devices. A 'Contacts' sidebar is partially visible at the bottom right.

**NEW VOICEMAIL MESSAGES »**

From	Date	Duration
206 Demo Admin	Jul 23rd 9:28 am	0:04
206 Demo Admin	Jul 23rd 9:26 am	3:00

**RECENT CALL HISTORY »**

Number	Name	Date	Duration
206wp	Demo Admin	Jul 23rd 9:27 am	0:35
206wp	Demo Admin	Jul 23rd 9:23 am	3:36
206wp	Demo Admin	Jul 23rd 9:22 am	0:10

**ACTIVE ANSWERING RULE »**

Default

**Simultaneously ring:**

- 200

**ACTIVE PHONES »**

You have no active phones.

Contacts

### 3.1 The Attendant Console

At the very top righthand corner of the Manager Portal homepage is a link to the Attendant Console. This link will open another webpage and take you to the Attendant Console Contact's as seen in figure 3.1.a.

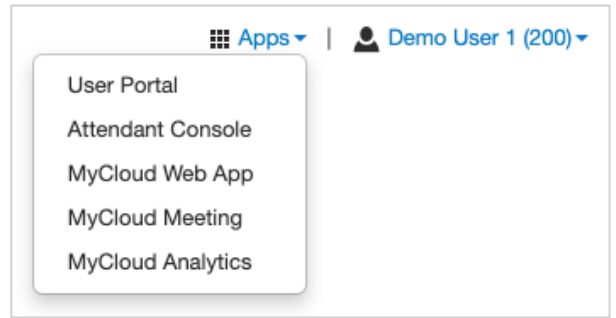


Figure 3.1.a

### 3.2 Dynamic Call parking

You can also enable Dynamic Call Parking from the Attendant Console as seen in figure 3.2.a. Call Park enables you to put a call into a parking orbit so that another user can then retrieve the call when they are available. Dynamic call park will place the caller in the first available parking spot. While static call parking parks the call on a specific extension.

The Contacts tab also seen in figure 3.2.a provides you with an overview of all the contacts in your organization and provides a status indicator. A green circle displayed next to a user's name and extension means that the user is currently available. A red circle means the user is currently unavailable as they are already on the phone with another user or have set their status to Do Not Disturb.

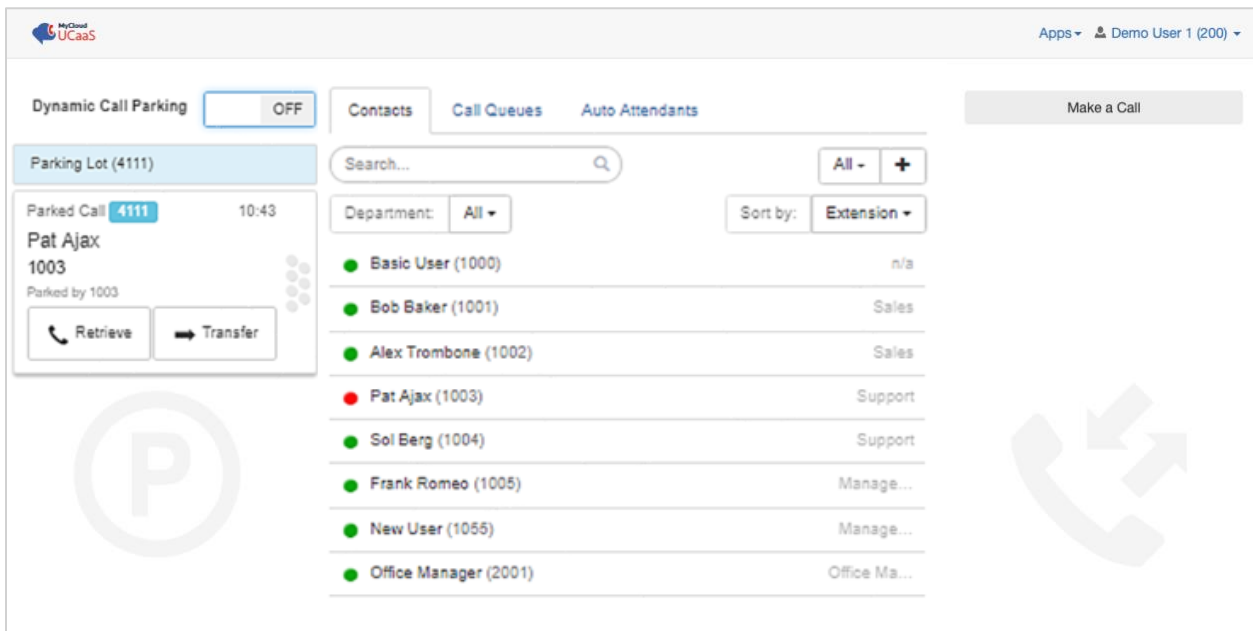


Figure 3.2.a

### 3.3 Contacts Tab

In the Attendant Console, clicking on an extension will bring up a new window as seen in figure 3.3.a, where you can call the contact at their extension, their work contact, mobile number, or their home contact number. You can also leave a voicemail for the contact.

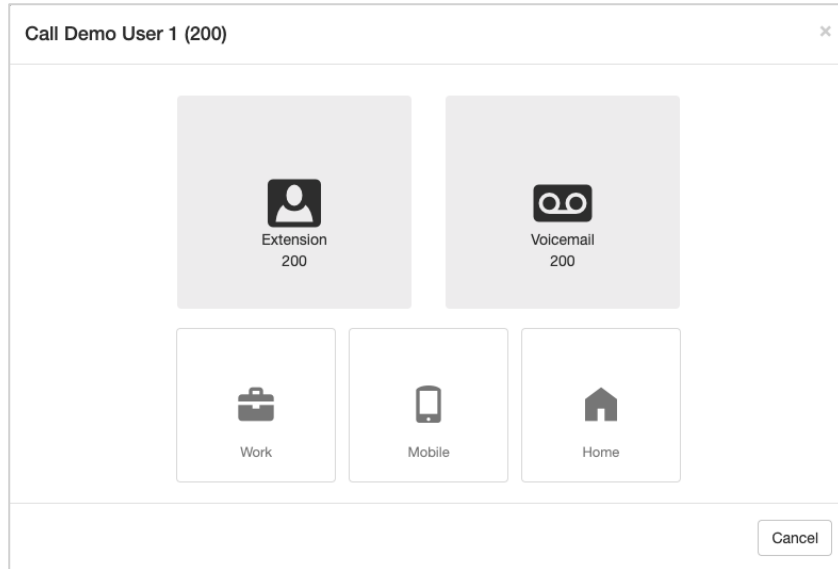


Figure 3.3.a

### 3.4 Call Queues Tab

The Call Queues tab of the Attendant Console will give you an overview of how many Call Queues your organization has, and the number of agents logged into each queue, as seen in figure 3.4.a.

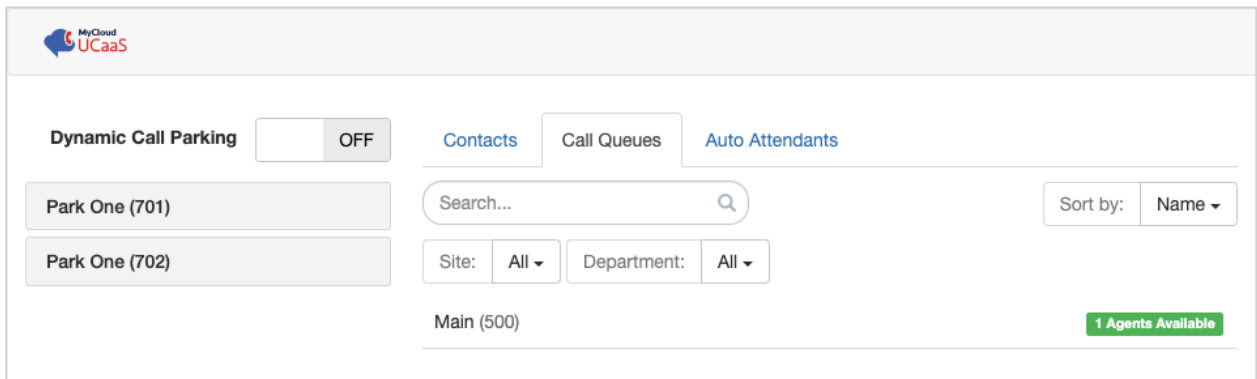


Figure 3.4.a

### 3.5 Auto Attendants Tab

The Auto Attendants tab as seen in figure 3.6.a will provide you with an overview of the Auto Attendants in your organization and allow you to click them to begin a call.

Back on the Manager Portal homepage next to the Attendant Console link you will see your name and extension number displayed as seen in figure 3.6.b. This link lets you manage your profile information. When clicking on the profile link the profile page will appear with the options to configure your account settings.

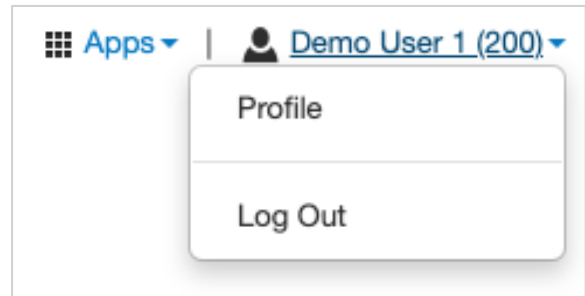
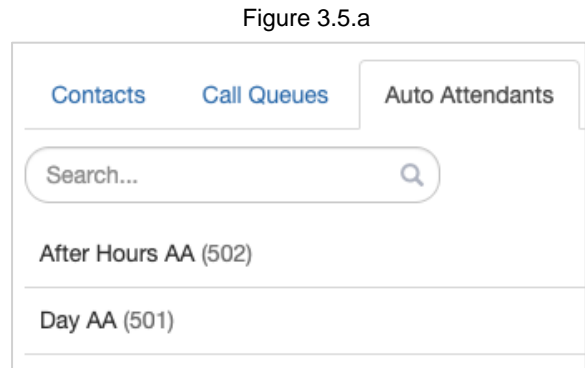


Figure 3.5.b

### 3.6 Widgets on Homepage

#### 3.6.1 New Voicemail Messages Panel

The New Voicemail Messages panel displays all new voicemails as seen in figure 3.6.1.a. The voicemails are displayed with the number of the caller that left a voicemail and their Caller ID name, followed by the date and time the message was left and the duration of the voicemail.

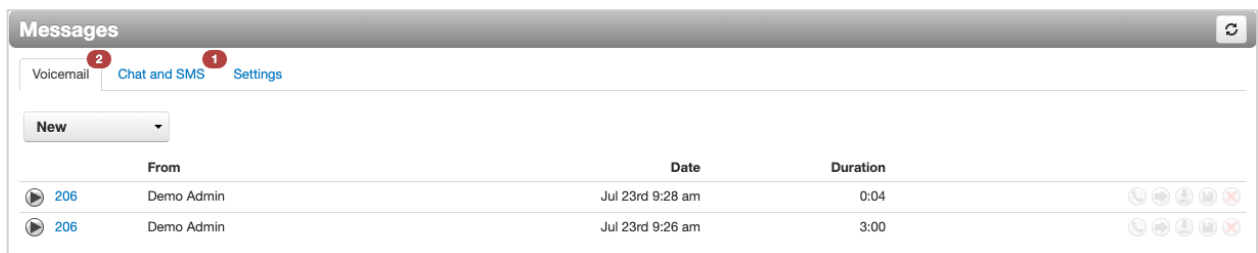


Figure 3.6.1.a

You will also see the options: Call to Play, Forward the Voicemail, Download the Voicemail Locally to your Computer or Delete the Voicemail Message. As seen in figure 3.6.1.b. If enabled, the option to view the transcription will also appear.

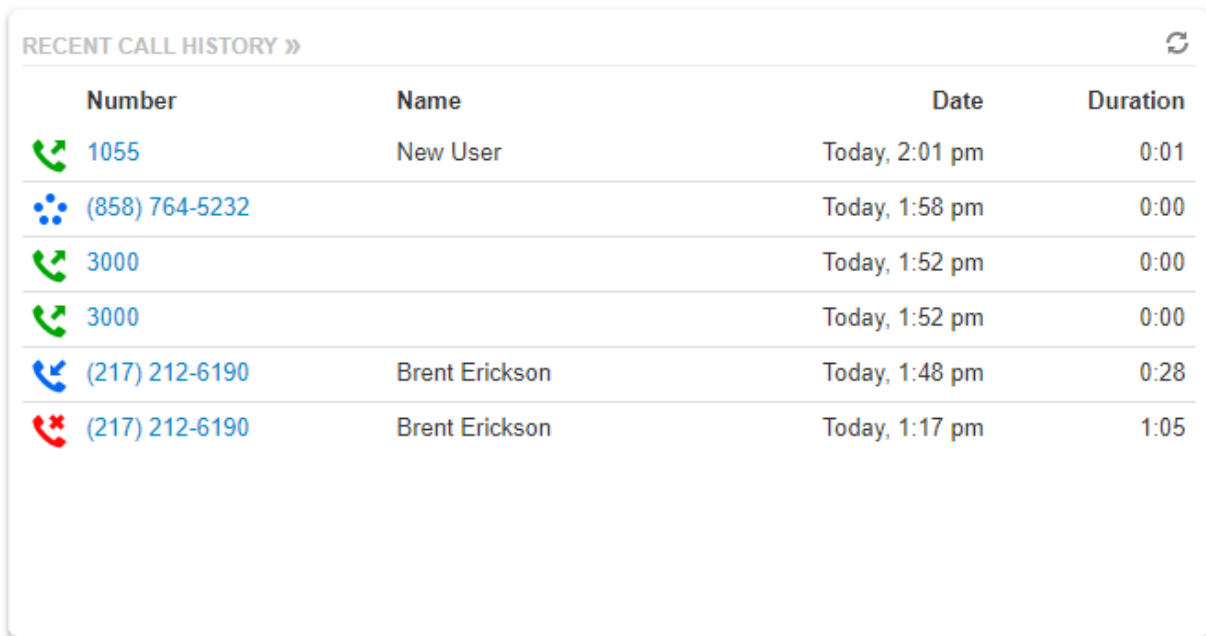


Figure 3.6.1.b



### 3.6.2 Recent Call History Panel

The Recent Call History panel provides an overview of the last 10 calls, as seen in figure 3.6.2.a. A phone icon with a green arrow represents an outbound call and a red icon means a call was not answered. A phone icon with a blue arrow means an inbound call was answered and 5 blue circles means that a call was placed to a conference bridge.





RECENT CALL HISTORY »				
Number	Name	Date	Duration	
 1055	New User	Today, 2:01 pm	0:01	
 (858) 764-5232		Today, 1:58 pm	0:00	
 3000		Today, 1:52 pm	0:00	
 3000		Today, 1:52 pm	0:00	
 (217) 212-6190	Brent Erickson	Today, 1:48 pm	0:28	
 (217) 212-6190	Brent Erickson	Today, 1:17 pm	1:05	

Figure 3.6.2.a

### 3.6.3 Active Answering Rule Panel

Active Answering Rule window, as seen in figure 3.6.3.a, will display which rule is currently active and provide a summary of how calls are routed when they reach your extension. You can select a different answering rule by clicking the Active Answering Rule drop down and selecting a different rule.

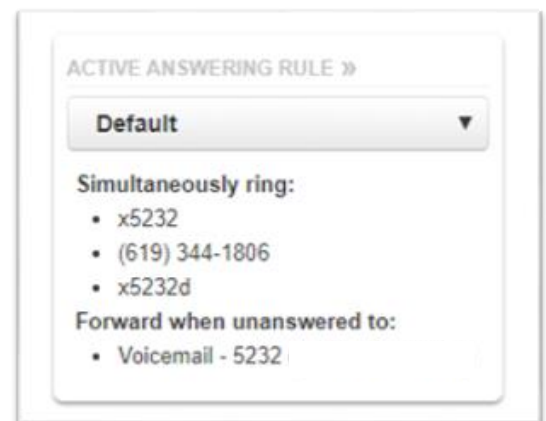


Figure 3.6.3.a

### 3.6.4 Active Phones Panel

The Active Phone fields, as seen in figure 3.6.4.a, list the active phones currently registered to your account. If you do not see a device listed that should be, your device is not configured for your account, or the device is currently unregistered.

ACTIVE PHONES »	
5232z	Z 3.15.40006 rv2.8.20
5232d	PolycomVVX-VVX_501-...
5232	Polycom/5.4.1.14510 P...

Figure 3.6.4.a

### 3.6.5 Navigation Options

On the top of the homepage under the Attendant Console, Profile, and Log Out options is the application navigation menu, as seen in figure 3.6.5.a. Selecting an option here will take you to that Applications Management Center for the option selected.

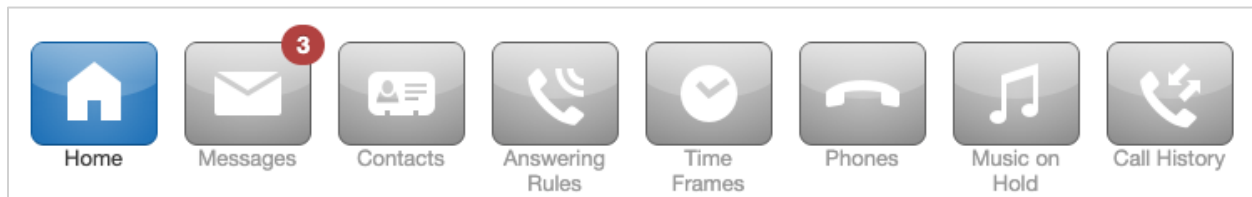


Figure 3.6.5.a

## 4. Profile

The Profile options below, as seen in figure 4.a, allow you to change your account options such as your First or Last Name, Security, and Voicemail PIN.

Figure 4.a

#### 4.1 Directory Options

Directory options allow you to configure how you are represented in the organization contacts in the Manager Portal and Audible Company Directory.

#### 4.2 Announce in Audio Directory

Checking the Announce in Audio Directory will list you in the company directory. Callers will be able to search for your extension when routed to a company directory.

#### 4.3 List in Directory

List in Directory controls if your extension is listed in the Contacts in your organization's Manager Portal.

#### 4.4 Caller ID Information

The Caller ID Information section allows you edit\* your area code for your Caller ID and appended when only dialing 7 digits on outbound calls.

**\* Contact your office manager if you need your Caller ID or 911 Caller ID.**

#### 4.5 Change Account Security

The Change Account Security section in the profile window allows you to manage your passwords and email settings for your account.

#### 4.6 Email Address

The Email Address field is where you configure the email address you would like to receive notification from. You can add more than one email address by clicking the green plus sign next to the email address field.

The screenshot shows a 'Profile' window with the following sections:

- Profile:**
  - First Name: Demo
  - Last Name: User 1
  - Timezone: America/Phoenix
  - Directory Options:
    - Announce in Audio Directory
    - List in Directory
- Caller ID Information:**
  - Area Code: 616
  - Caller ID: 4803627150
  - Emergency Caller ID: 6166990590
  - Emergency Address: Saddleback Corporate
    - 10190 E McKellips Rd
    - Scottsdale, AZ 85256, US
    - [Add location description](#)
- Change Account Security:**
  - Email Address(es): demo1@saddlebackcomm.com (+)
  - New Password: [Empty]
  - Confirm New Password: [Empty]
    - Minimum length of 8 characters, minimum of 1 capital letter(s), minimum of 1 number(s), Your extension cannot be part of your password.
  - Current Password: [Empty]
    - Your current password is required to update your email address or security information.
- Change Voicemail PIN:**
  - New PIN: [Empty]
    - Minimum length of 4 characters, your extension cannot be part of your password.

Buttons: Cancel, Save

#### 4.7 New Password

The Password field allows you to configure your account with a new Manager Portal password used to login with. Below is the Confirm Password field which requires you to enter the new password a second time for verification.

#### 4.8 Current Password

If any changes are made to the Change Account Security options, entering your current password is required for security purposes.

#### 4.9 Change PIN

The Change PIN option allows you to change the numeric password used to check voicemail messages over the phone.

**To log out after making changes, click the Log Out link as seen in figure 3.1.a. You'll be logged out of the Manager Portal and taken back to the login page.**