



Office Manager: Users

Contents

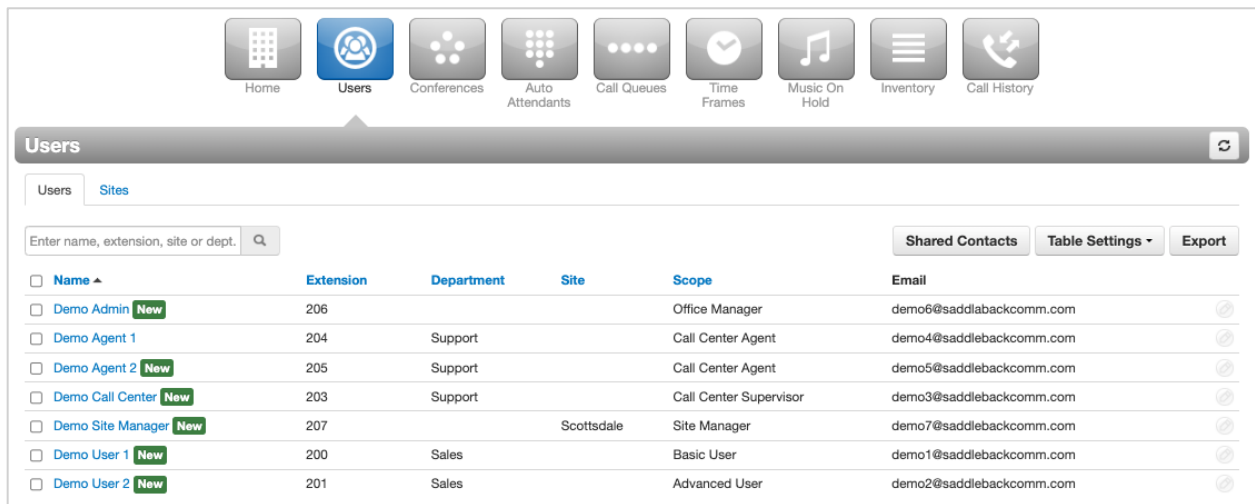
1. **Office Manager: Users**
 - 1.1 Scopes
 - 1.2 User Options
 - 1.3 Hide System Users

1. Office Manager: Users

The Users icon, as seen in figure 1.a, will take you to the users center as seen in figure 1.b. This is where you can view and manage the users on your domain. Users are destinations you want to send calls to. Every person's account, Conference Bridge, Auto Attendant, and Call Queue in the organization is a User.



Figure 1.a



Users

Users Sites

Enter name, extension, site or dept.

Shared Contacts Table Settings Export

<input type="checkbox"/> Name	Extension	Department	Site	Scope	Email
<input type="checkbox"/> Demo Admin New	206			Office Manager	demo6@saddlebackcomm.com
<input type="checkbox"/> Demo Agent 1	204	Support		Call Center Agent	demo4@saddlebackcomm.com
<input type="checkbox"/> Demo Agent 2 New	205	Support		Call Center Agent	demo5@saddlebackcomm.com
<input type="checkbox"/> Demo Call Center New	203	Support		Call Center Supervisor	demo3@saddlebackcomm.com
<input type="checkbox"/> Demo Site Manager New	207		Scottsdale	Site Manager	demo7@saddlebackcomm.com
<input type="checkbox"/> Demo User 1 New	200	Sales		Basic User	demo1@saddlebackcomm.com
<input type="checkbox"/> Demo User 2 New	201	Sales		Advanced User	demo2@saddlebackcomm.com

Figure 1.b

1.1 Scopes

Scopes are a level of permissions we assign to a User which provide them access to various features. Below are the various scope levels that can be assigned to new users.

- **Simple User** - Has no manager portal access and no voicemail services.
- **Basic User** - Is a user that can login to the Manager Portal, has voicemail services, and has access to use the web/mobile softphone application.
- **Call Center Agent** - Can login in and out of queues.
- **Call Center Supervisors** - Is a user that can monitor and manage call center agents, view call queues and call center statistics.
- **Office Managers** - View and manage all users and inventory on the account. Office Managers can also view and create conference bridges, auto attendants, call queues, and time frames.
- **Site Manager** – Has the same abilities as an Office Manager, except they cannot create Time Frames.

1.2 User Options

After the User has been created you can then click on the User and the tabs as seen in figure 1.2.a will appear, allowing you to:

- Edit their profile information.
- Set their answering rules.
- Configure their voicemail options.
- The Phones tab allows you to:
 - Add a new phone to the users account by clicking the Add Phone button.
 - Edit or delete an existing phone.
- The Advanced options allow you to
 - Reset the User.
 - Send a Welcome with a link to configure their password and voicemail PIN.
 - Force Password Reset to change the user's password.

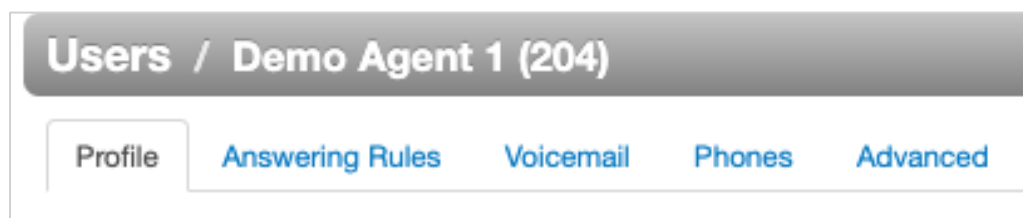


Figure 1.2.a

1.3 Hide System Users

The Hide System Users option as seen in figure 1.3.a, will filter for User's accounts only. Unchecking this option will also display Conferences Bridges, Auto Attendants, and Call Queues user accounts.

The screenshot shows a web interface for managing users. At the top, there is a navigation bar with icons for Home, Users (selected), Conferences, Auto Attendants, Call Queues, Time Frames, Music On Hold, Inventory, and Call History. Below the navigation bar is a header for the 'Users' section with a refresh icon. A search bar is present with the placeholder text 'Enter name, extension, site or dept.' and a search icon. To the right of the search bar are buttons for 'Shared Contacts', 'Table Settings', and 'Export'. The main content is a table with columns: Name, Extension, Department, Site, Scope, and Email. The table contains 15 rows of user data. At the bottom right, there is a 'Users: 15' label, a checkbox for 'Hide System Users' (which is currently checked), and a 'View:' dropdown menu showing options for 25, 50, and 100 items per page.

<input type="checkbox"/>	Name ▲	Extension	Department	Site	Scope	Email	<input type="checkbox"/>
<input type="checkbox"/>	TOD 16166990590	16166990590			Basic User		<input type="checkbox"/>
<input type="checkbox"/>	Day AA Auto Attendant	501			Basic User		<input type="checkbox"/>
<input type="checkbox"/>	Demo Admin New	206			Office Manager	demo6@saddlebackcomm.com	<input type="checkbox"/>
<input type="checkbox"/>	Demo Agent 1	204	Support		Call Center Agent	demo4@saddlebackcomm.com	<input type="checkbox"/>
<input type="checkbox"/>	Demo Agent 2 New	205	Support		Call Center Agent	demo5@saddlebackcomm.com	<input type="checkbox"/>
<input type="checkbox"/>	Demo Call Center New	203	Support		Call Center Supervisor	demo3@saddlebackcomm.com	<input type="checkbox"/>
<input type="checkbox"/>	Main Call Queue Call Queue	500	Support	Scottsdale	Basic User		<input type="checkbox"/>
<input type="checkbox"/>	After Hours AA Auto Attendant	502			Basic User		<input type="checkbox"/>
<input type="checkbox"/>	Park One Call Queue	701			Basic User		<input type="checkbox"/>
<input type="checkbox"/>	Park One Call Queue	702			Basic User		<input type="checkbox"/>
<input type="checkbox"/>	Scottsdale Site Site	Scottsdale			No Portal		<input type="checkbox"/>
<input type="checkbox"/>	Demo Site Manager New	207		Scottsdale	Site Manager	demo7@saddlebackcomm.com	<input type="checkbox"/>
<input type="checkbox"/>	guest user	guest			Basic User		<input type="checkbox"/>
<input type="checkbox"/>	Demo User 1 New	200	Sales		Basic User	demo1@saddlebackcomm.com	<input type="checkbox"/>
<input type="checkbox"/>	Demo User 2 New	201	Sales		Advanced User	demo2@saddlebackcomm.com	<input type="checkbox"/>

Figure 1.3.a