



# Phone & User Assignments

## **Feature Overview**

The Phone and User assignment functionality is the foundation for all other service setup components of the BroadCloud PBX service. This process ties together all the pieces of the service to make it available for the user. The system is designed to allow customers and partners to quickly configure and modify user station and phone assignments in real time without requiring extensive technical knowledge.

### There are four basic components required for a user to be ready for service:

- 1. The phone number or DID
- 2. The station type or feature package
- 3. The equipment to be assigned (this can be optional)
- 4. The end user assigned to the phone

# **Feature Prerequisites**

Before the User Assignment service can be used the following conditions must be met:

- At least one phone number needs to be in inventory. The number can be a 2-way number, 2-way Remote number or an inbound only number.
- At least one station package must be in inventory.
- At least one device needs to be in inventory. This is optional if a virtual station is being built.
- If an extension is required, it can be a 2 to 6-digit number conforming to the following rules:
  - The user's extension cannot conflict with special services numbers. As a result, the following numbers cannot be assigned as extensions: 00, 011, 211, 311, 0311, 1311, 411, 0411, 1411, 511, 611, 0611, 1611, 711, 811, 911, 0911, 1911.
  - If the last 4 digits of the user's telephone number conflicts with a 4-digit special services numbers, the extension will be left blank when the user is provisioned. If an extension number is required, any nonconflicting 2 to 6-digit number can be assigned.

# **Feature Setup**

Prior to setting up Site Services, or allowing Users to make calls, the Site administrator must set up the Users. Once logged in to My Account, simply follow the steps detailed below.

### Step 1: Go to My Site and select the appropriate Site to configure



### Step 2: Go to Phone Assignments

		Home Profile Orde	ers Account Admin My Si	e Call Recording My Reports
Eruption Audio				Welcome Eruption Audio!
Select a Site	Main 3366 Jenks Ave Panama City FL 32405-4			
۹.	🟫 🔲 Phone Assignment 🔺 Dev	ice Managem & Site Services	L User Features ⊙	Call History 🖌 Notes
(14565) Main				
(14566) Site1 1 67) Site2				
Select the Phone Assignm	nent tab You	Ir dashboard to manage the	to My Site	service
	Choose from	nage your service		
	Add/Modify Users	🍘 Set Up Auto Attendant	1 Share a Line	♂ Set Business Hours
	Reset User Password	Monitor a Line	Set/Change Call Policy for Site	Set Business Continuity
	Manage Voicemail/Admin Portal	Check Phone Status	Set/Change Call Policy for a User	

# Step 3: Determine if you are assigning a single station or multiple stations through bulk upload

If you are assigning in bulk, follow the on-screen directions. If you are assigning a single station or one at a time, continue to step 4.

O Edit				Station Inventory	Bulk Assig	nments 🗉 🏕 Ex	port Instructi	ons
Search		< >			1	1	<b>†</b>	
hone Number	Station	Extension	Model	MAC Address	Port	First Name	Last Name	
85055591					0		850555914	~
8505559144			2		0			
8505559154	ew the active, ava tal count of each s	silable, and Station type	Click to begi	n the Bulk	0		for making Bulk	Assignm
8505559131	dered for the site			e process	<b>0</b>		8505559131	
8505559150							8505559150	
8505559147					Create .C	SV file	8505559147	
8505559153					station/de	evice/user	8505559153	
8505559138					assignme	nts for the	8505559138	
8505559151					site v		8505559151	
8505559132					0		8505559132	
8505559157					0		8505559157	
8505559145					0		8505559145	
9185559001					0		9185559001	
8505559156					0		8505559156	
8505559135					0		8505559135	
8505559158					0		8505559158	
8505559127					0		8505559127	
8505559136					0		8505559136	
8505559155					0		8505559155	
8505559134					0		8505559134	
8505559148					0		8505559148	
8505559137					0		8505559137	~

• Edit				Station Inventory	Bulk Assig	nments 🔹 🏕 Ex	port Instructi	ons
Search		< >						
hone Number	Station	Extension	Model	MAC Address	Port	First Name	Last Name	
8505559146					0		8505559146	
8505559144					0		8505559144	
8505559154					0		8505559154	
8505559131		•			0		8505559131	
8505559150					0		8505559150	
8505559147					0		8505559147	
8505559153	0				0		8505559153	
8505559138	Select t	station/phone/user			0		8505559138	
8505559151					0		8505559151	
8505559132					0		8505559132	
8505559157					0		8505559157	
8505559145					0		8505559145	
9185559001					0		9185559001	
8505559156					0		8505559156	
8505559135					0		8505559135	
8505559158					0		8505559158	
8505559127					0		8505559127	
8505559136					0		8505559136	
8505559155					0		8505559155	1
8505559134					0		8505559134	
8505559148					0		8505559148	
8505559137					0		8505559137	

### Step 4: Select the Phone Number to assign

Step 5: Assign the Station (Defines the available User features)



**Note**: The list of available Station Types will reflect the current list that can be assigned for that site. If additional stations are required, an order must be entered to add them, or an existing assigned station must be unassigned.

In the event that a Station is being reassigned from a previous user, you will be prompted if there are any Voicemail messages left for the previous User, and asked if you wish to remove those messages for the new assignment or not. Simply click to select Yes or No and proceed.

To designate a station as Fax lines (removing compression), select the checkbox shown below:

Station, Device And User Assignment	00
Showhide panel by dicking triangular button	
Showing Assignment settings for Phone Number: 8505559159	
Device:	
Full Name: . 8505559159	
Station: Analog Station	
Station Phone And Model Assignment User Info	
Station Assignment	
Assigned Station: Analog Station	
	✓ Assign C Unassign → Next
	X Cancel

### Step 6: Assign the Phone



**Note**: The list of available phones and MAC addresses will reflect all phones related to this customer site – even if they are already assigned to other users. This allows the option to assign multiple phone numbers to the same phone.

Note that when adding Multiple Line Appearances (MLA) in phone assignments:

- The number of line appearances displayed on the phone will be determined by the number of buttons the model supports.
- The maximum number of call-waiting calls in queue is 4 per station. Additional line appearances can be assigned, but do not extend the concurrently usable number beyond 4. The exceptions are Hosted Square Key 8-line and 12-line station types.
- Shared Call Appearances only display one Line Appearance for the shared station, regardless of the MLA configuration for the primary device.
- MLA does not apply to soft clients as they only support a single line appearance.

**Note**: Once assigned, the Multi-User Phone and Settings button are enabled. These are used only if the phone is designated as a Hoteling Host. See the Hoteling QRG for details.

If an analog station is selected, assign the ATA, and specify the protocol for Fax or general analog use. T.38 is the default for faxing and will support higher speed fax machines.

Station, Device And User Assignment	00
. 8505559144	^
Station: Analog Station	
Station Phone And Model Assignment User Info	
A Phone And Model Assignment	In
Model: Cisco SPA122	
MAC Address: FFBD00000657	
Port:	
Line Appearances:	
A Fax Line Settings Select the Fax protocol	
This station is a fax line:	
Normal Use     Use T 38 faving	
Use G.711 faxing	
🖌 Assign 🕻 Una	ssign → Next -
	🗙 Close

### Step 7: Define the User

ation, Device And User Assignment		00
Show/hide panel by clicking triangular buttor		
Showing Assignment settings for —		
Station Phone And Model Assignment	User Info	
Create/Edit User Info		
A End User Info	MyPhone User Info User Id:	
4 Last Name: 8505559139	You may edit the First and Last name of default, the last name is the telepho	of the user. By one number
Caller ID#:	2	
8505559139 Extension: 9139	Select the outg station using available 2-way	going caller ID for the the drop down list of y numbers for the site
Reset Voicemail Pat	Select an 2-6 digit Extension for the s (default is the last four digits of TM)	tation
		🗙 Cancel

**Note**: The User will have a default assignment for Outbound Caller ID. This will either be the Main number for the site, or the individual user's phone number if the phone number is a 2-way DID. The default Caller ID number is shown in the above screen, and can be changed to any 2-way DID available on the site by clicking on the '2-Way List' and selecting another number. This allows the users to display different appearances when making outbound calls.

Station, Device And User Assignment	00
Show/hide panel by clicking triangular button	
<ul> <li>Showing Assignment settings for</li> </ul>	
Station Phone And Model Assignment User Info	
Create/Edit User Info	
And User Info	yPhone User Info
For station types with a My Phone User Account, enter the User ID	ld:
Last Name: Emai	:
850555913 5	
Caller ID#: Enter the Email address 8505559139 for the My Phone user	0
Extension:	Click to Save changes and create
9139	the user account (if entered)
Reset Voicemail Password Delete MyPhon	e User 🛛 Reset MyPhone Password 🖌 Save
The buttons will rese Password or My Phone	t the Voicemail Password, sending
an email to the ad	dress above 🗶 Cancel

Once saved, the Show Assignment settings area will display the revised information for the user. Closing the Station, Device and User Assignment box will return to the main view of Phone Assignments and reflect the recently completed assignments.

Show/hide panel by clicking triangular button
Showing Assignment settings for Phone Number: S505559139 Device: Polycom VVX 300 Full Name: Test User Station: Executive Station Station Phone And Model Assignment User Info Create/Edit User Info
Create/Edit User Info
A fund User Info      First Name:      Test Last Name: User Caller ID#: 8505559139

🗘 Edit				Station Inventory	Bulk Assign	ments 🔻 🖌 🖈 Exp	Instructi	01
Search		< >						
Phone Number	Station	Extension	Model	MAC Address	Port	First Name	Last Name	
8505559127					0		8505559127	
8505559136					0		8505559136	
8505559155					0		8505559155	
8505559148					0		8505559148	
8505559137					0		8505559137	
8505559126					0		8505559126	
8505559159	Analog Station				0		8505559159	
8505559160					0		8505559160	
6505559133					U		6000009133	1
8505559139	Executive Station	9139	Polycom VVX 300	700782559701	1	Test	User	
0505550400					÷		0505550400	4
8505559161	Executive Station	9161			0		8505559161	
8505559146	Executive Station	9146			0		8505559146	
8505559158	Executive Station	9158			0		8505559158	
8505559147	Executive Station	9147			0		8505559147	
8505559150	Executive Station	9150			0		8505559150	
8505559143	Common Plus	9143			0		8505559143	
8505559145	Hosted Squar	9145	Polycom300	B12312313712	1		8505559145	
8505559131	Executive Station	9131	Polycom300	B12312313712	1	cbanner	8505559131	
9185559001	Executive Station	9001	Polycom300	691462613486	1		9185559001	
8505559138	Executive Station	9138	Polycom300	266168082897	1	BB	Bill	
8505559135	Executive Station	9135	Polycom300	266168082897	1	David	Lee	

Step 8: Resetting User Logins

Station, Device And User Assignment	108
Show/hide panel by clicking triangular button	Select the User Info tab
<ul> <li>           Showing Assignment settings for</li></ul>	
Station Phone And Model Assignment User Info	
Create/Edit User Info	
– ▲ End User Info	MyPhone User Info
First Name:	User Id:
Test	testuser
Last Name:	Email:
User	user@domain.com
Caller ID#:	
8505559139 -	
Extension:	
9139	
Reset Voicemail Password Delet	e MyPhone User Reset MyPhone Password 🗸 Save
Click the respect Password or N	ive button to reset the Voicemail Ity Phone Password, sending an Cancel

Once completed, the User will receive an email with their new login credentials.

**Step 9: Unassigning Users, Phones, & Stations** Removal of assignments is a simple matter of repeating the above steps in a manner that results in removed User information, no phone assignment, and no station assignment. This would be required in the event that partial disconnection of service is required, or if change out of phones or User is required.

Station, Device And User Assignment		0
Show/hide panel by clicking triangular button	Select the User Info tab	
<ul> <li>Showing Assignment settings for</li> </ul>		
Station Phone And Model Assignment User Info		
Create/Edit User Info		
- ▲ End User Info	MyPhone User Info	
First Name:	User Id:	
Test	testuser	
Last Name:	Email:	
User	user@domain.com	
Caller ID#:		
8505559139 ~		
Extension:		
9139		
Reset Voicemail Password	Delete MyPhone User Reset MyPhone Password	Save
Click t	he Delete MyPhone User button	🗙 Cano

### To unassign a device

Station, Device And User Assignment Show/hide panel by clicking triangular but	Select the Phone and Model Assignment tab
- The Showing Assignment settings for Station Phone And Model Assignment	User Info
Phone And Model Assignment	
Model: Polycom VVX 300	
MAC Address: 700782559701	
Port: 1 Line Appearances: 1	Click the Unassign button
Multi-User Phone Settings	✓ Assign 🕑 Unassign → Next
·	
	X Cance

To unassign a station, unassign the device, then

Station, Devic	Select the Station tab			00
Show/hide paper	by clicking triangular button			
– 🔻 Showing Assi	gnment settings for —			
Station Phone	And Model Assignment	User Info	1	
Station Assignm	ient		Click the Unassign button	
Assigned Station:	Executive Station			
	This station is a fax line			
			🗸 Assign 🕑 Un	assign 🖌 → Next
				X Cancel