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:
  o 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.
  o 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 non-conflicting 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
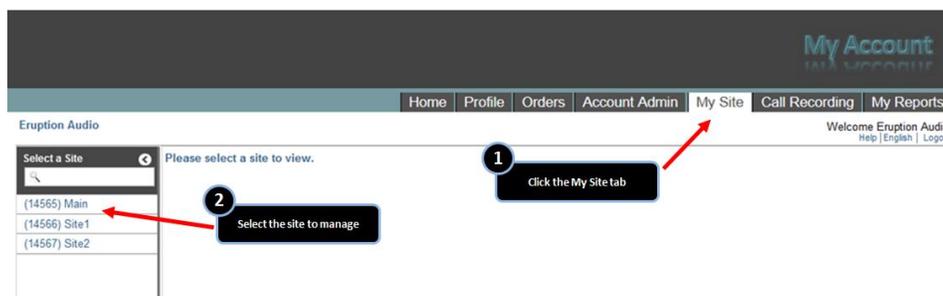
Step 2: Go to Phone Assignments
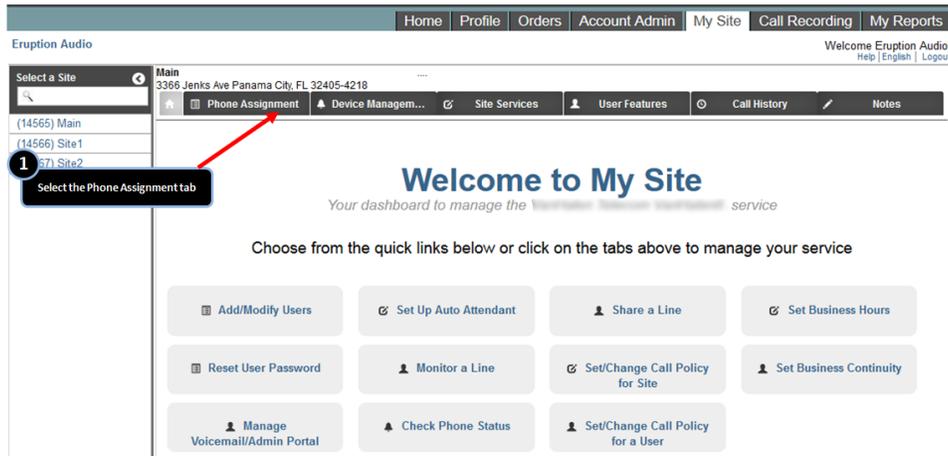
Step 3: Determine if you are assigning a single station or multiple stations through bulk upload

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.
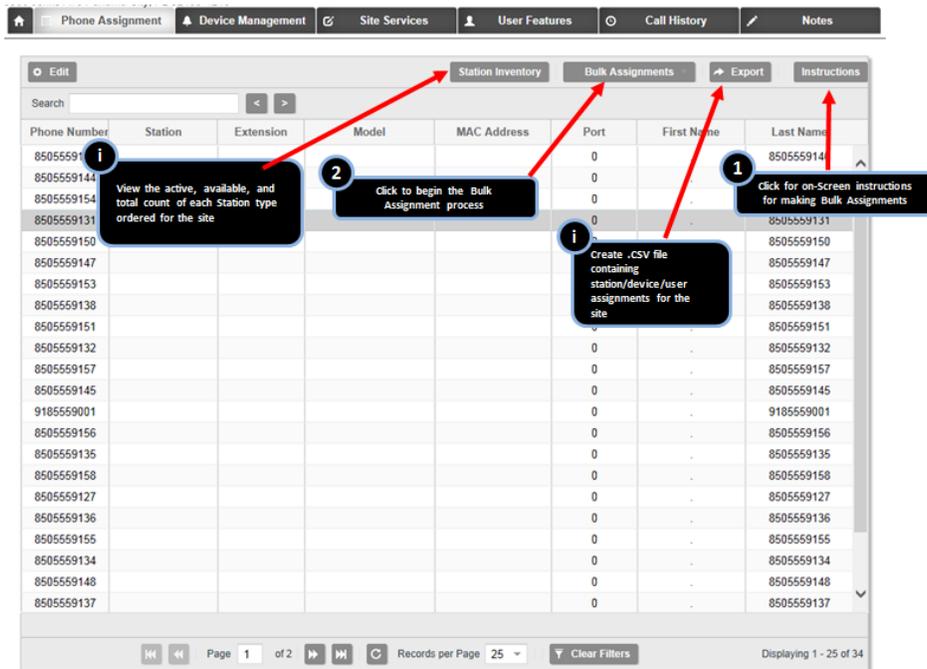
Step 4: Select the Phone Number to assign

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:
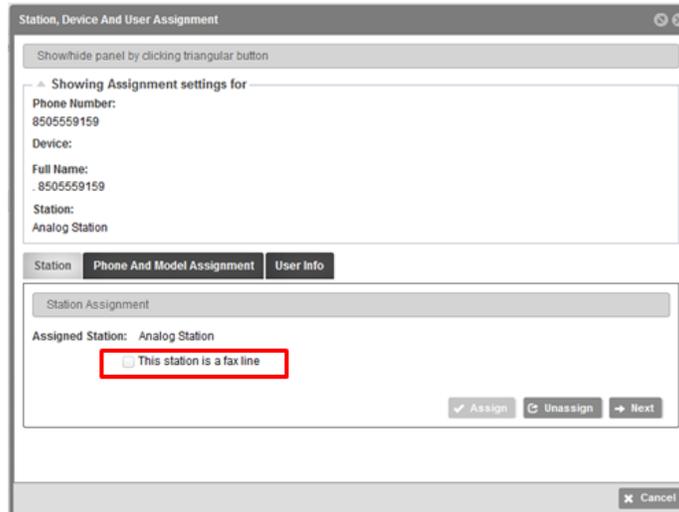
Step 6: Assign the Phone
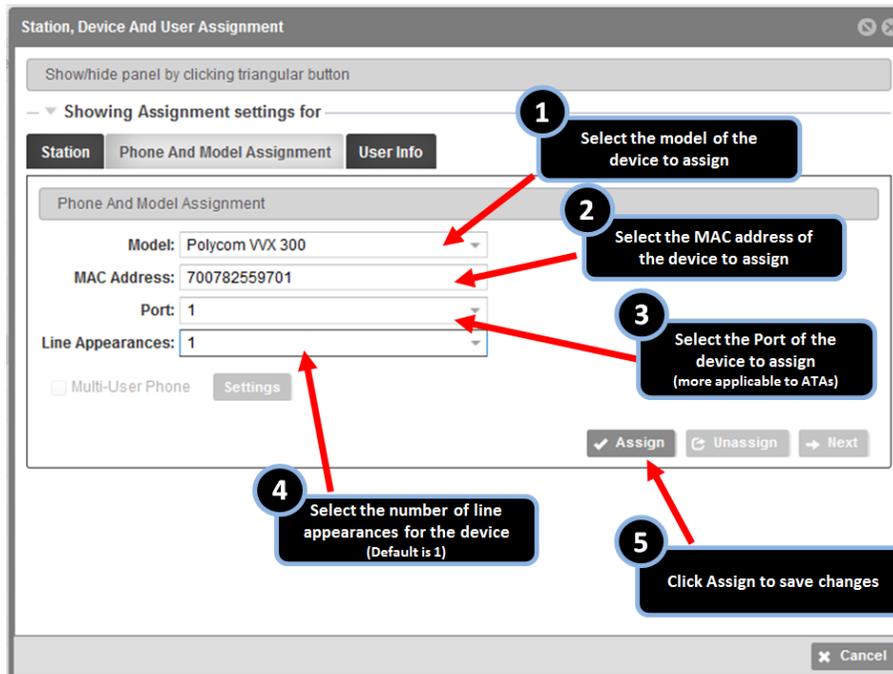
Note: The list of available phones and MAC addresses will reflect all phones related to this customer site – even if they are already assigned to other users. This allows the option to assign multiple phone numbers to the same phone.

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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.
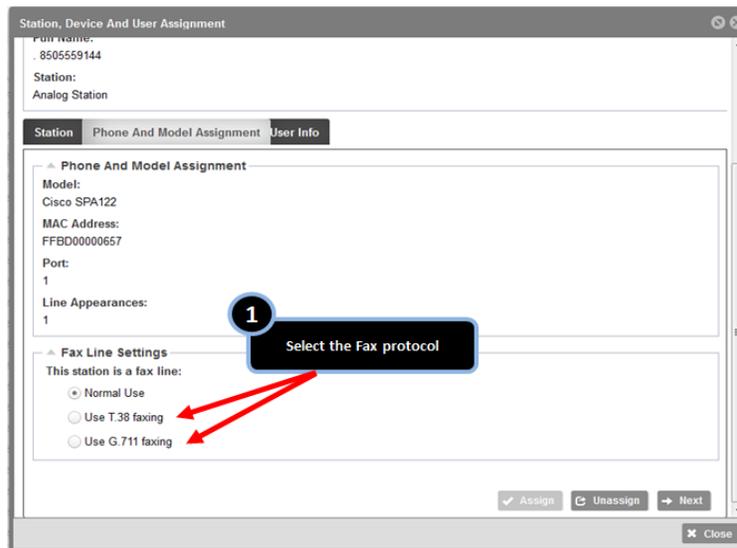
Step 7: Define the User
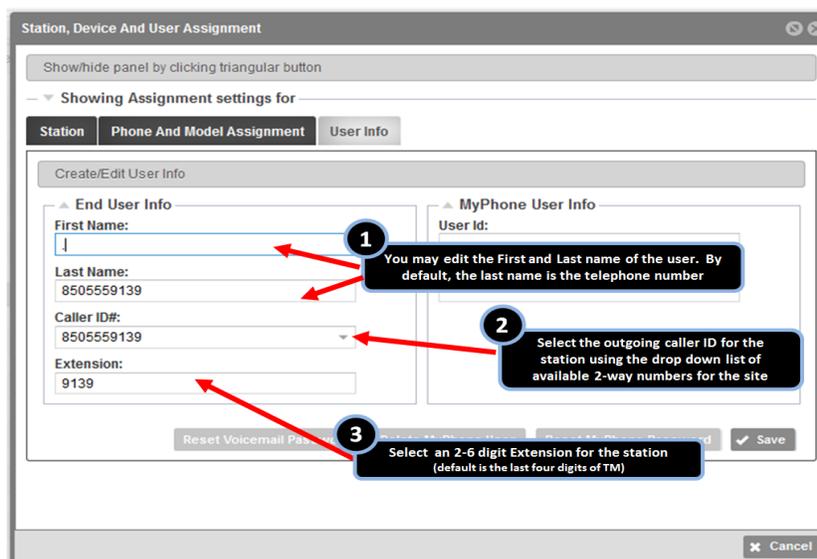
Note: The User will have a default assignment for Outbound Caller ID. This will either be the Main number for the site, or the individual user's phone number if the phone number is a 2-way DID. The default Caller ID number is shown in the above screen, and can be changed to any 2-way DID available on 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.

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.

Step 8: Resetting User Logins

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

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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.
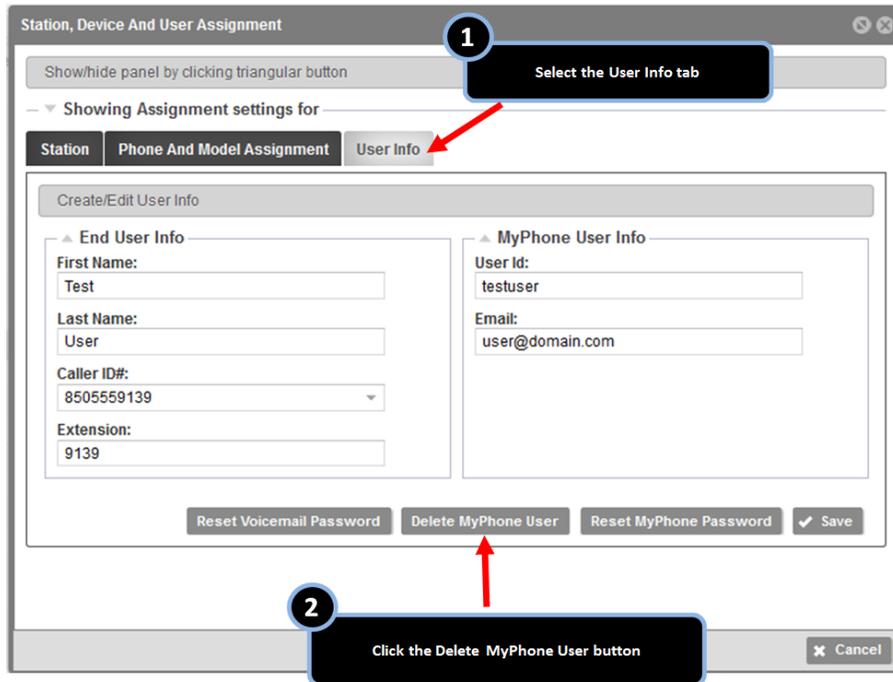
To unassign a device
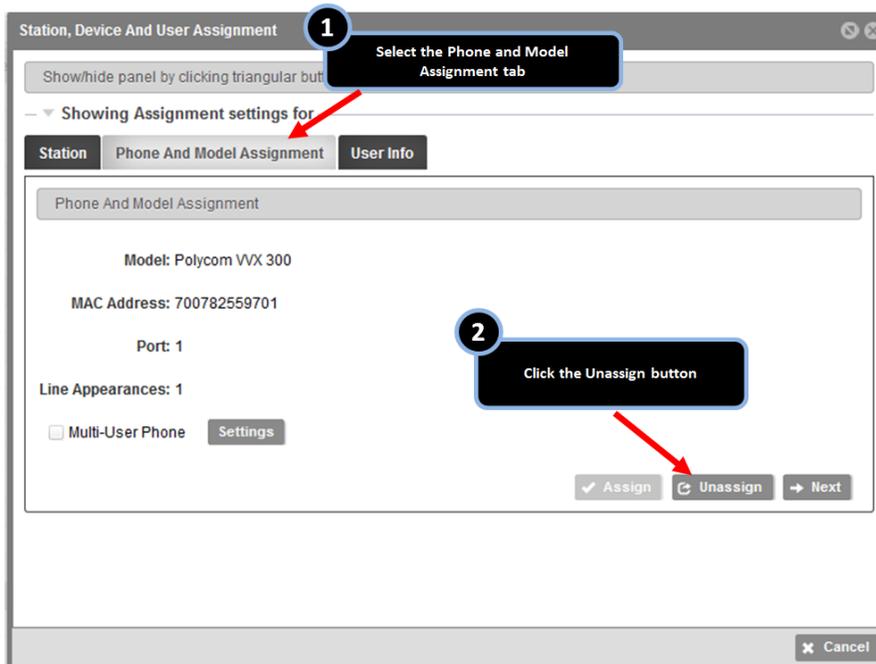
To unassign a station, unassign the device, then