



BroadCloud PBX – My Phone Portal Getting Started Guide

Document version 1.0, dated 25 April 2017

Frontmatter information

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Acknowledgements

The content herein is based on the following document provided to Cloud Direct as a service provider and reseller of this product:

- BroadCloud PBX – My Phone Portal, My Phone Portal - Getting Started Guide, Release 16.1, Document Version 1, ©BroadSoft.com.

The original document remains untouched, with the following exceptions which have been made to ensure a positive experience for customers of Cloud Direct:

- Where appropriate, contact details, graphics, and web links amended to reflect Cloud Direct.

Contacting Cloud Direct

If you require advice or assistance regarding this product, then please contact Cloud Direct using the following contact details.

For	Phone	Email
Sales	0800 0315966	sales@clouddirect.net
Technical Services (support)	0800 0789438	Tech_Services@clouddirect.net
Customer Services	0800 0789437	



BroadCloud PBX – My Phone Portal

My Phone Portal - Getting Started Guide

Release 16.1

Document Version 1

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Getting Started Guide

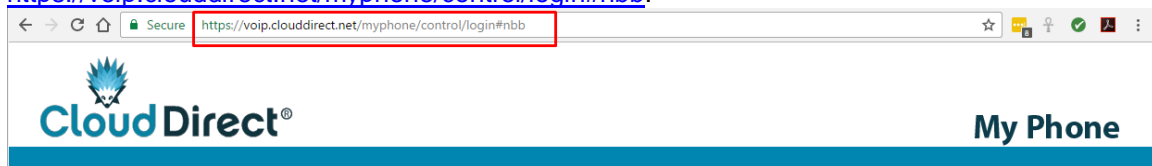
The BroadCloud My Phone Portal is a self-service web portal for BroadCloud PBX users to manage / customize their BroadCloud PBX Unified Communication (UC) Features. Through the My Phone portal, users have complete access to all of their Unified Communication services.

Within the My Phone Portal, Users can:

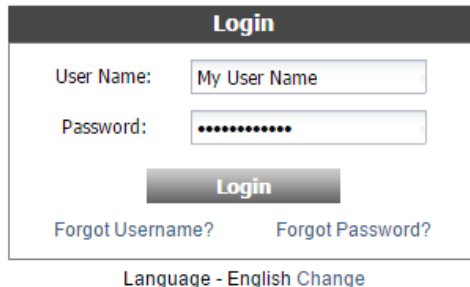
- Manage unified messaging preferences
- Create unique call handling rules for special phone numbers, or to accommodate different times of day or days of week
- Manage preferences for traditional features like call forwarding, anonymous call rejection, etc.
- Set Simultaneous Ring preferences for exceptional availability
- Manage access and download user clients
- View call history

Logging into the BroadCloud My Phone Portal

1. Open an Internet browser and go to the Service Provider portal at <https://voip.cloudirect.net/myphone/control/login#nbb>.



2. At the login box

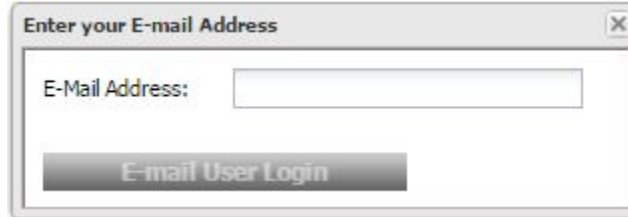


3. If you would like to change the default language used for the My Phone portal, click on the [Change](#) button at the bottom of the box.
4. Enter your **User Name**** and **Password**** provided by your Site Administrator
**If you have forgotten your username or password, see reset instructions below.
5. Click the [Login](#) button.

Resetting My Phone portal Username and / or Password

My Portal forgotten username – Click on [Forgot Username?](#)

1. You will be prompted for your registered email address



2. Enter your email address and click the [Email User Login](#) button.
3. Your username will be sent to you via email.

My Portal forgotten password – Click on [Forgot Password?](#)

1. You will be prompted for your My Phone portal User ID



2. Enter your User ID and click the [Reset Password](#) button.
3. An email will be sent to you with a temporary password.
4. User the temporary password to access your My Phone Portal.
5. You will be immediately prompted to change your password.



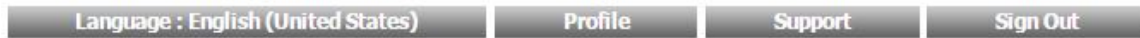
Your password must be at least eight characters long and include at least one letter and one number or special character (for example: !@#%&*()-=_+[]{}).

My Phone Portal

The My Phone portal has two menu bars:

1. User Settings Menu Bar
2. User Dashboard Menu Bar

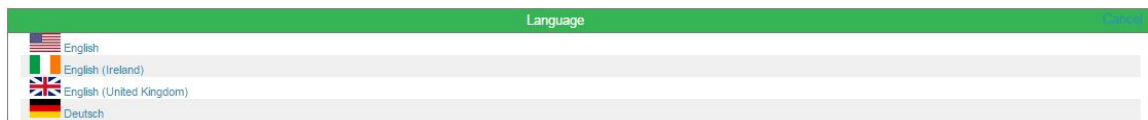
User Settings Menu Bar



1. Language Set the default portal Language
2. Profile Reset portal password, reset voicemail password, set time zone
3. Support Access portal support information
4. Sign Out Log out of the My Phone portal

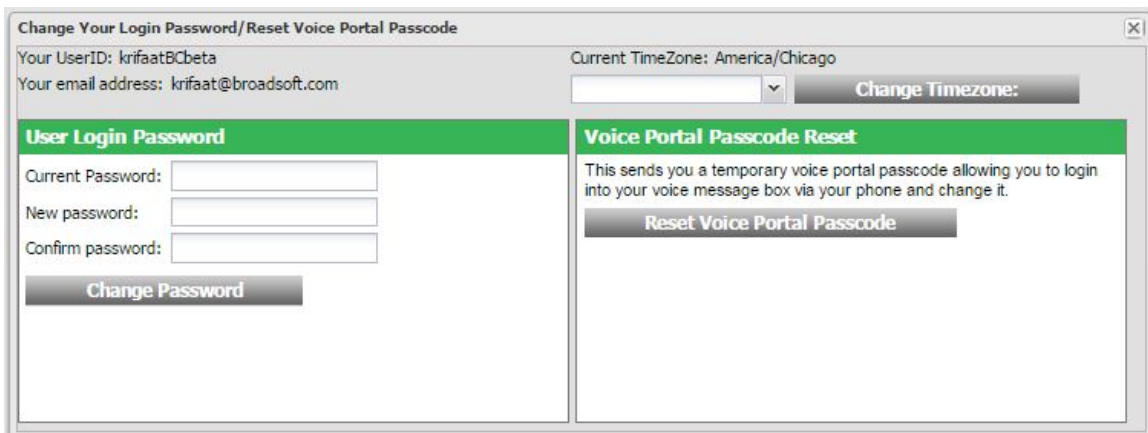
Language Tab – User Settings Menu Bar

The My Phone portal supports multiple languages. To change the default language, click on the Language Button on the top menu bar, the following menu will appear:



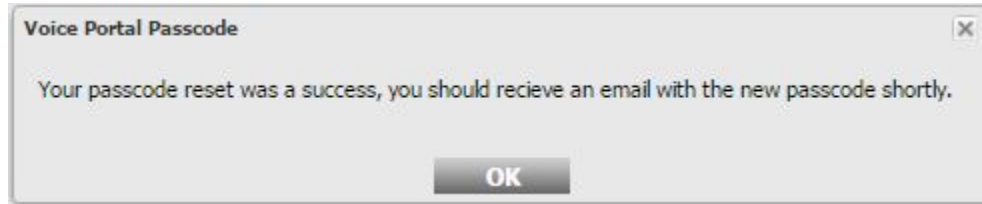
Profile Tab – User Settings Menu Bar

The Profile menu allows users to change their My Phone portal password, voicemail password, and set their default time zone.



Resetting your Voicemail password

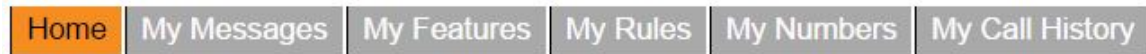
1. Click on the Reset Voice Portal Passcode button.
2. A pop-up window will appear notifying you that the password reset process has started and that your temporary password will be sent via your registered email address.



3. Within a short time, you will receive an email with your new voicemail password.

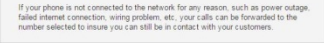
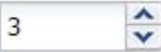




User Dashboard Menu Bar

The Dashboard menu consist of five primary tabs that contain configuration options for the various aspects of the User's BroadCloud PBX services. These tabs are divided into logical Feature groupings.






It is recommended that users start with the My Numbers tab as it contains configuration settings that apply to the other Dashboard configuration tabs, specifically, the Personal Directory section of the My Numbers tab. This will be discussed further in the My Numbers section of this walkthrough.

Configuration Icons

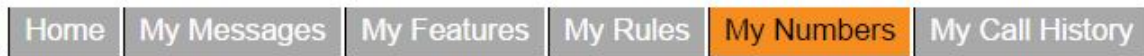
<u>Icon</u>	<u>Icon Description</u>
	Informational Boxes within the portal are Light Grey .
	Incrementing Boxes are used to increase/ decrease values.
	Radio-Buttons are used to Select options.
	Check Boxes are used to Enable / Disable options.
	Data Fields are used to enter information.
	Pull-down Boxes allow Users to select from a list of options.

Status Icons

The following icons are used within all configuration pages to show the current status of the Feature that is being configured.

- Features with a  are currently inactive.
- Features with a  are currently active.
- Features with a  are currently not available.

My Numbers Tab – Dashboard Menu Bar



The My Numbers tab allows users to configure frequently used phone numbers to be used when configuring services such as Call Forwarding, Simultaneous Ring, and Office Anywhere (aka Anywhere). Additionally, Users can also access their Enterprise Directory and configure Speed Dial entries to be used on their office phone.

The following can be accessed through the My Numbers tab:

Personal Directory	A user configurable list of numbers that can be used in other Feature configuration areas, i.e. Call Forwarding, Simultaneous Ring, Office Anywhere, etc...
Enterprise Directory	A list of Enterprise contacts provided by your Company
Speed Dial	A user configurable list of up to 100 frequently dialed contacts.

For detailed instructions on how to configure these options, please refer to Cloud Direct knowledge article, [Using BroadCloud My Phone My Numbers](#).



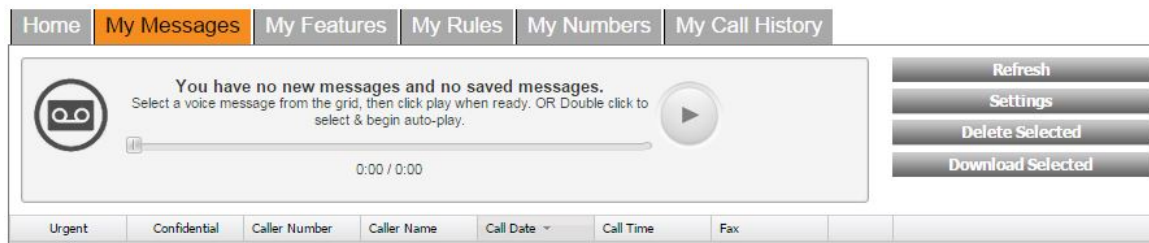
My Messages Tab – Dashboard Menu



The My Messages tab allows users to access their voicemails and faxes via multiple options beyond direct phone access. This enables users to be on the go, not in the office but have their finger on the pulse of their business at all times. Voice messages and fax messages can be retrieved for playback/viewing or download via My Messages on the My Phone dashboard, or via email with copies sent to any email address. Voicemails are sent in.WAV format, while Faxes are .TIFF.

Additionally, if Users want a notification that a message was received, notifications can be sent to their cell phone via text or email. This allows users to be mobile and also have real time access to their voicemails and faxes as if they were in the office.

To learn more about the different settings available in My Messages and how to personalize your configuration, see Cloud Direct knowledge article, [Using BroadCloud Unified Messaging](#).



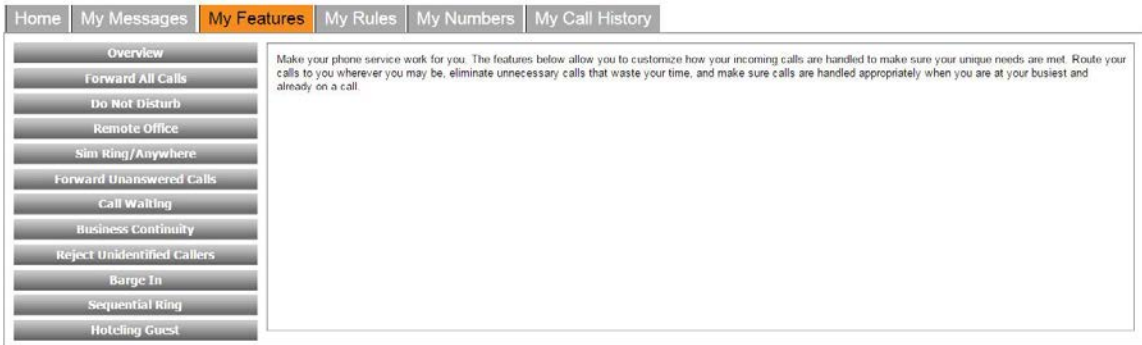
<u>Settings Menu</u>	<u>Settings Options</u>
Voice Messaging	Voice Messaging: <input checked="" type="radio"/> On (busy and unanswered calls go to voicemail) <input type="radio"/> Always (all calls go directly to voicemail) <input type="radio"/> Off (no voicemail)
Fax Messaging	Fax Messaging: <input type="radio"/> On <input checked="" type="radio"/> Off
Message Storage	Message Storage: <input checked="" type="radio"/> System Mailbox <input type="radio"/> External Mailbox <input checked="" type="checkbox"/> Message waiting indicator on phone E-Mail Address: <input type="text"/>
Additional Settings	Additional Settings: <input type="checkbox"/> Get notified when new message is received via: <input type="radio"/> Text to cell <input type="text"/> <input type="radio"/> E-Mail Address <input type="text"/> <input type="checkbox"/> Send a copy of all new messages to another email address. E-Mail Address: <input type="text"/> <input type="checkbox"/> Transfer on "0" to <input type="text"/>
Greetings	Greetings Number of rings before playing greeting: <input type="text" value="3"/> Busy: <input checked="" type="radio"/> System <input type="radio"/> Personal <input type="text" value="Select a file to upload."/> <input type="button" value="Browse"/> No Answer: <input checked="" type="radio"/> System <input type="radio"/> Personal <input type="text" value="Select a file to upload."/> <input type="button" value="Browse"/>

My Features Tab – Dashboard Menu



The My Features tab allows Users to self-configure their BroadCloud UC Features.

For a complete list of BroadCloud PBX features, you can reference the Cloud Direct knowledge article, [BroadCloud Feature Definitions](#).



Feature	Cloud Direct Knowledge Base Link
Overview	General overview of configurable features
Forward All Calls	Call Forwarding QRG
Do Not Disturb	Do Not Disturb QRG
Remote Office	Remote Office QRG
Sim Ring/Anywhere	Simultaneous Ring QRG
Forward Unanswered Calls	Call Forwarding QRG
Call Waiting	Call Waiting QRG
Business Continuity	Business Continuity QRG
Reject Unidentified Callers	Unidentified Callers QRG
Barge In	Barge In QRG
Sequential Ring	Sequential Ring QRG
Hoteling Guest	Hoteling QRG

My Rules Tab – Dashboard Menu

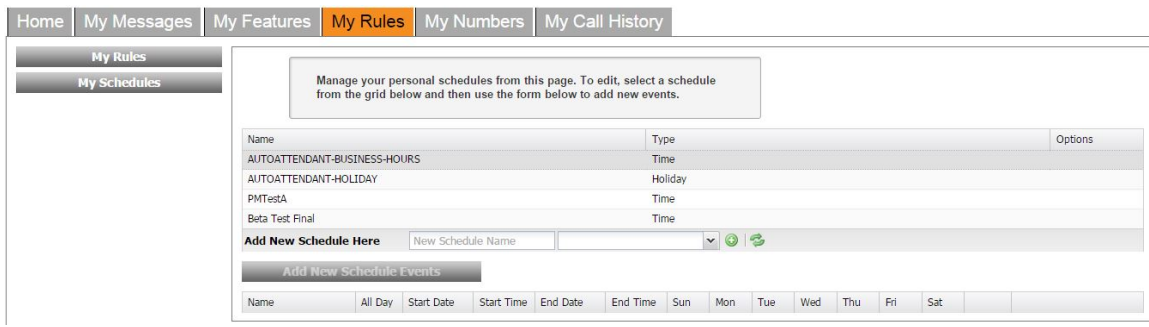


My Rules is where you can create different rules to forward, reject or accept certain calls based on the phone number of the person calling and/or time of day and day of the week when the calls are received. You can also add schedules that determine when your rules are active. It's recommended to add your schedule, or schedules before creating a rule.

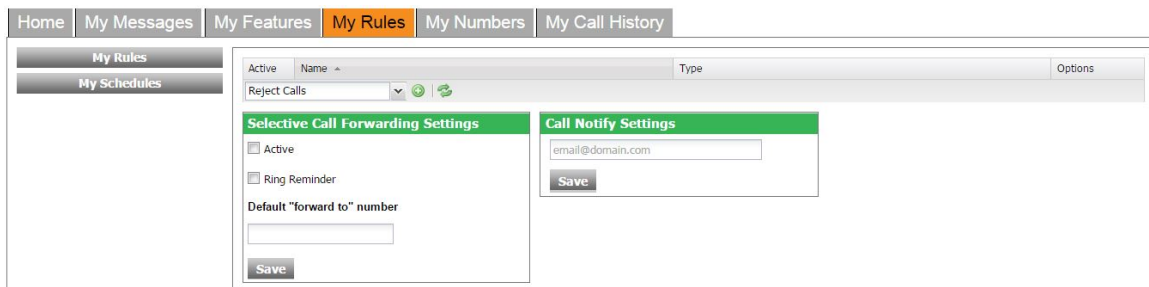
Usage Example: An individual may want to make sure they don't miss a call from a certain number regardless if they are in the office or not. Other individuals may want to have their office phone ring simultaneously with their mobile phone between 8:00am and 5:00pm but transfer to voicemail after office hours. These settings and much more can be accomplished with My Rules.

To learn more about the different settings available in My Rules and how to personalize your configuration, see Cloud Direct knowledge article, [Using BroadCloud My Rules](#).

Schedules Tab Configuration Screen



Rules Tab Configuration Screen



My Call History Tab – Dashboard Menu



Using the My Call History tab, Users can view the call history for their account. Call history includes such information as start / end date, Other Party information, Caller ID, Call Duration, City / State / Zip information, and type of call (outgoing, incoming and missed).

Individual users want a simple way to see their call history (outgoing, incoming and missed) and to place calls via the click to dial feature.

To learn more about running and exporting call history detail, go to Cloud Direct knowledge article, [Using BroadCloud Call History](#).

