

simplifi[®]



Simplifi Contact

Core: Device User

The Device User page is used to assign an extension to a user. By doing this, multiple devices can be assigned a single extension. One user may be assigned one or more physical phones or a softphone, or any combination of them. In addition, the settings for each user allow them to have control over when each device rings in sequence.

A user does not need a unique telephone number with Core, and instead need only an extension.

Navigation: Voip > Device Users

ELCONE MIKE HALEY
JME > VOIP > DEVICE USERS

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VOIP FINANCE REPORTS

+ ADD DEVICE USER

DEVICES can be associated with a Device Users making it easier to manage multiple devices for an individual user

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EXT	NAME	EMAIL	PHONE	DEVICES
	Nick Shevillo	nshevillo@ngt.com	202-525-2888	3
	Mark Hedstrom	mhedstrom@ngt.com	202-525-2888	2
	Matt Miller	mmiller@ngt.com	202-525-2888	2
	Tod Williams	twilliams@ngt.com	202-525-2888	2
	Keith Ellingson	kellingson@ngt.com	202-525-2888	4
	Shane Switzer	sswitzer@ngt.com	202-525-2888	2
	Keith Test	ktest@ngt.com	202-525-2888	2

The landing page of the Device Users will show some details about the user including their extension, email address, outbound Caller ID, and how many devices that users has assigned to them.

- **Extension** - A unique number assigned to a user that when dialed will ring all of the devices assigned to the user, based on the Ring Rules set for that user.
- **Name** - The user's full name. This name will be used in the Company Directory, if the company uses one. This can differ from what will be displayed on internal CID, based on settings of that user.
- **Email** - This designates where voicemails will be delivered. Multiple email addresses can be assigned to a single extension.
- **Phone** - The outbound Caller ID number when this device user/extension dials off-net.
- **Devices** - Shows how many different devices and/or softphones are assigned to this user. When editing the device user, you can control the ring flow for these devices.

1. Click on any device user to edit its details.
2. Click on +Add Device User to create a device user.

Now Let's explore what's inside a Device User's page.

The Device User represents a person on the network. It is different from a portal user in that a device user exists in Core as a VoIP object and entity at the same time. The device user can own devices, be included in groups, and be routed to among other things, yet it is a representative of a person in the VoIP feature set, allowing a user to participate in the voip experience.

The Device User form contains information pertinent to the user. If creating a new device user, the form will be mostly blank. If editing an existing device user, the form will be filled with the existing device user's data. Other than this, the Add Device User and Edit Device User forms are the same.

USER INFORMATION

The user information section of the form contains data that is specific to the device user identity. It's not required to be a real name, but the more information you put here, the easier it will be to identify later on for you and the customers that you grant access to.

- **User Information** - This section houses the User/Extension identity details. It's not required to be a real name, but the more information you put here, the easier it will be to identify later on for you and the customers that you grant access to.
- **Email** - This should be the main email address for the extension. We have Additional Emails in the following sections, which we'll talk about in a moment. If only one email address is needed on an extension, put it in this first email address slot.
- **Timezone** - This section is NOT for updating the time on a device. It is to set Timezone for Call Records and for the Voicemail to Email. If you update this section, you must also go to any device assigned to this user and simply hit "Save" to update their records as well with this new information.
- **Extension Number** - is the user's extension within the network. It must be unique among Device Users and Voicemail Boxes. If a voicemail box is created for the user via DeviceUser:Features, this will also be the id of the user's voicemail box.

SERS > EDIT DEVICE USERS

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EDIT DEVICE USER - MIKE HALEY

USER INFORMATION

*First Name: Mike
*Last Name: Haley
*Email Address:
*Timezone: (UTC-05:00) Eastern Time
*Extension Number: 3002
Enable Agent Status: NO

ID: 106162
Modified: 01/27/2021 @ 2:00 PM
Created: 12/09/2020 @ 3:54 PM

FEATURES

FEATURES

There are a plethora of features for our Device Users, so let's explore them.

- **Voice Mail Number** - Enable if you wish this user to have a voicemail box & number. We allow a simple slider to turn on and off voicemail to an extension as well as the voicemail-to-email feature. With Voicemail Number turned on, you can choose from the list of Voicemail boxes that exist on the account or "Create New". If "Create New" is selected, Core will create a new voicemail box out of the extension number entered in user information and attach it to the device user.
- **Voicemail to Email** - if enabled will translate voicemail messages and send them to the device users email address. There is a field provided if you wish the emails to be sent to an additional address.
- **Additional Emails** - This area should have different email addresses that the customer would like have receive these voicemails at. If the same email address is used here as in the section above, it will cause duplicate emails. Separate the emails in this text box with a comma.
- **Add to Company Directory** - Yes or No. This will hide or allow for the extension to be searched within the Directory that a customer may call into. It will base its entry on the Name that was input at the top.
- **When Found** - Sets where the caller will be routed if they were to identify this device user through the company directory.
- **Add Conference** - This is a quick means to create a conference through the device user interface. The conference created will use this device user's name and extension as its identity(Name and Number). With Add Conference: ON you will be able to designate a PIN for the conference.

- **Inbound Call Recording** - Enable/Disable automatic recording of all inbound calls to the device user.
- **Outbound Call Recording** - Enable/Disable automatic recording of all outbound calls from the device user.
- **Dynamic Call Recording** - Enable/Disable the call recording feature codes. This gives the user the ability to record any of their calls on the fly.
- **Hot Desking** - is the ability for a user to receive calls at another device within the network. You can not have Hot Desking and FMFM enabled at the same time. If this feature is turned on (Voip > Account Settings), a user can select whether their extension may be enabled for this. A PIN may be assigned to this as well.

CALL LOGIC

Call logic settings allow you to set parameters for inbound and outbound call behavior.

- **Reset Caller ID** - Setting this to Yes will erase any prepends added to the Caller ID by the system based on the routing the call took to display only the original Caller ID
- **Prepend Caller ID** - This will add to the beginning of incoming Caller ID anything set into this field.
- **FMFM** - if enabled will ring all devices belonging to the user on incoming call. **No Answer** becomes a required field. **Enable Time Based Routing** switch becomes available. **Note:** You can not have FMFM and Hot Desking enabled at the same time.
- **Enable Time Based Routing** - If on, this feature allows the user to route their incoming calls based on conditions set in a time table. The time table becomes available once this setting is switched ON. **Outside Timeframe Route To** becomes available as well.

The time table becomes available with Enable Time Based Routing:ON. The table will be presented to the right of the device user's devices. With this table, you will set Inside and outside timeframes. Inside timeframe typically defines operational hours, and Outside timeframe typically defines all other hours. Incoming calls during Inside timeframe will be routed to the user's devices, incoming calls during the outside timeframe will be routed to the **Outside Timeframe Route To** designation.

- **Outside Timeframe Route To** - Choose routing destination for any calls that come in during the outside time frame.
- **Not Registered** - if no devices belonging to the user are registered with the provisioning server, calls to the user will be routed to an outside number provided here.
- **Busy Route** - choose the routing destination for any inbound calls while the line is occupied.
- **No Answer** - Choose routing destination for any inbound calls the do not get answered.
- **On Net Caller ID Name** - For internal calls only, to assign a Name to show up when calling another extension.

- **On Net Caller ID Number** - Generally this will be the extension number of the user, but can be set to any extension currently existing on the account.
- **Off Net Caller ID Number** - Choose from any number on the account. Any device assigned to this extension will use this number when they send a call off network.

ME > VOIP > DEVICE USERS > EDIT DEVICE USERS

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 DISA
 Dynamic CID
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 Bulk Tools
 Collapse Menu

BETA Web Phone: ON

CALL LOGIC

INBOUND CALLS

- Reset Caller ID: NO
- Prepend Caller ID:
- Find Me Follow Me: OFF
- Seconds to ring:
- Not Registered:
- *Busy Router: VoiceMail Mike Haley -
- *No Answer: VoiceMail Mike Haley -

OUTBOUND CALLS

No special characters are permitted.

- *On Net Caller ID Name:
- *On Net Caller ID Number:
- *Off Net Caller ID Number:

DEVICES

Add Another Device: ● Add New ● Use Existing

*Device Name:

*Device Type: VoIP Phone

*E911 Location: -- Select --

Manufacturer: -- Select --

Model:

*Config Template:

MAC Address:

+ SAVE & ADD TO LIST

TYPE	DEVICE NAME
	Mike Haley Web Phone
	Mike Haley Mobile App

USER ACCESS

Link to a Portal User? ● Add New ● Use Existing

Link To: Mike Haley

If any devices are attached to the device user, they will be listed in a table in this section. You can also add/remove devices from the user. There is means to create a device from this interface if you wish to create a device belonging to this device user, or you can select from an already existing device. With **Find Me Follow Me** turned on, the Devices section adjusts itself to give control over which device will ring when, and for how long. After ringing for the assigned amount of time, if not answered, the **"No Answer"** route will be used.

To have simple-user dashboard access, a portal user and device user must be linked. You can set that linkage from either interface. Here at Device User interface, you can create a portal user, or choose from an existing portal user. This will allow this user/extension to have a Simple Device User, for more in depth CDRs. If you are going to allow end users access to the portal, it may be worth creating these accounts for them.

CALL RESTRICTIONS

Set restrictions for calling that are specific to the device user. Note that you can not allow a call type that is denied at the account level. Therefore INHERIT simply means that this setting will mimic the setting at account level, and DENY does not allow the call regardless of account level setting.

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DEVICES

Add Another Device: ☐ Add New ☒ Use Existing

TYPE	DEVICE NAME
	Mike Haley Web Phone
	Mike Haley Mobile App

Add Another Device: ☒ Add New ☐ Use Existing

*Device Name:

*Device Type: VoIP Phone

*E911 Location: -- Select --

Manufacturer: -- Select --

Model:

*Config Template:

MAC Address:

+ SAVE & ADD TO LIST

USER ACCESS

Link to a Portal User? ☐ Add New ☒ Use Existing

Link To: Mike Haley

ON

ON

Account Admin: ON

ROLES

ACCOUNT

Account Administrator: YES

Technical: YES

Account Builder: YES

Billing: NO

Support Rep - Account: YES

Administrator: YES

Agent Actions: ON

Call Center Console: ON

Call Center Admin: ON

Call Recordings: ON

Chat: ON

BETA Meetings: ON

Plan Type: Lite

Meeting Admin: ON

Notes: ON

Presence: ON

Traffic: ON