WESTCOAST CLOUD VOICE
powered by **Blueface**

USER'S GUIDE

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USERS

To fully take advantage of Westcoast Cloud Voice, you will be required to configure each employee as a user. Only the employees that you set up as a user on the portal will have login credentials to access the portal where they can view their own activity.

USER PRIVILEGES

To take full advantage of the portal, add all relevant employees as users. **Customer administrators** have the access level necessary to add and edit users.

When you add your employees as users, they will receive their own unique portal login details via the email address linked to their account. You can also grant a level of access that is appropriate to each employee's role. The privileges applied to each user level have been outlined below:

Please note: if you want to record all calls, you must ensure that all employees are set up as users and that they have a **device** linked to their profile.

CUSTOMER ADMINISTRATORS

A customer administrator has full access to control all features on the account. These features will be outlined in detail through other permission levels.

FEDERATION ADMINISTRATOR

A **federation** is a set of accounts that are linked together, such as a franchise operation that has a number of customer-facing locations, that are all linked under an overall umbrella organisation.

It may be advantageous to allow some users access to see and make customer admin-level edits to all federated accounts. To do this, federation administration status can be assigned to key users.

A federation administrator will have access to view all accounts associated with their **federation group** and can manage these accounts. They will have the same permission level on all accounts that a customer administrator would have.

REGULAR USER

A regular user has access to view their own information such as their personal **call history, voicemails, contacts** and **call recordings**. A regular user can download (but not delete) their own call recordings. They cannot see any other details on the portal and cannot make any changes.

GROUP MONITOR

Group monitors can be a team leader who needs to see information regarding other users in their team. A group monitor has the same access as a regular user with the additional ability to view call history and call recordings for the user group they are assigned to.

They will not have any other control over the account.
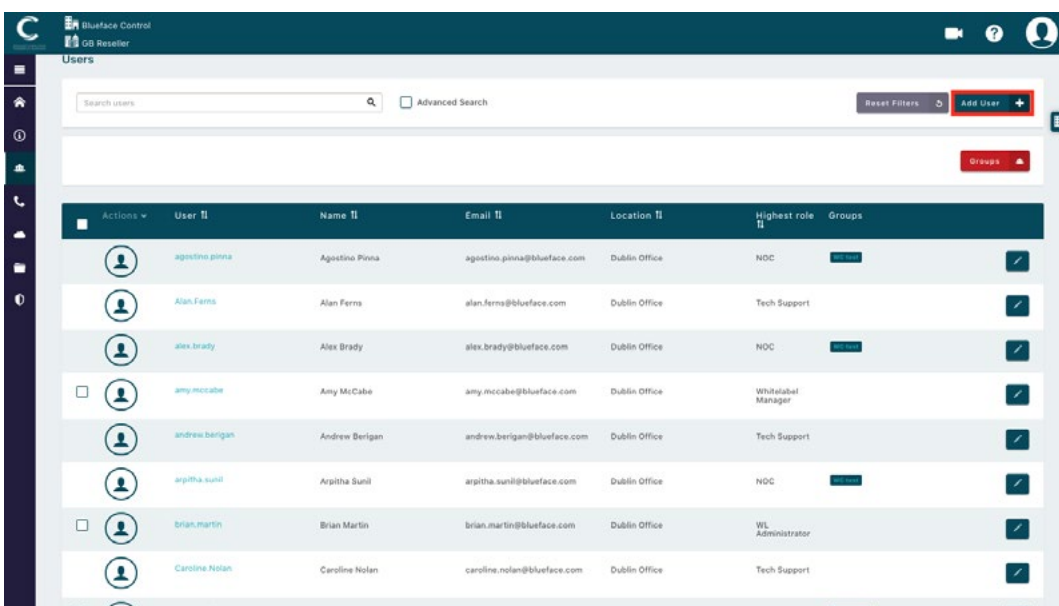
ADDING A USER

A customer administrator can add new users to the account at any time. Follow the steps below to add a user to your account.

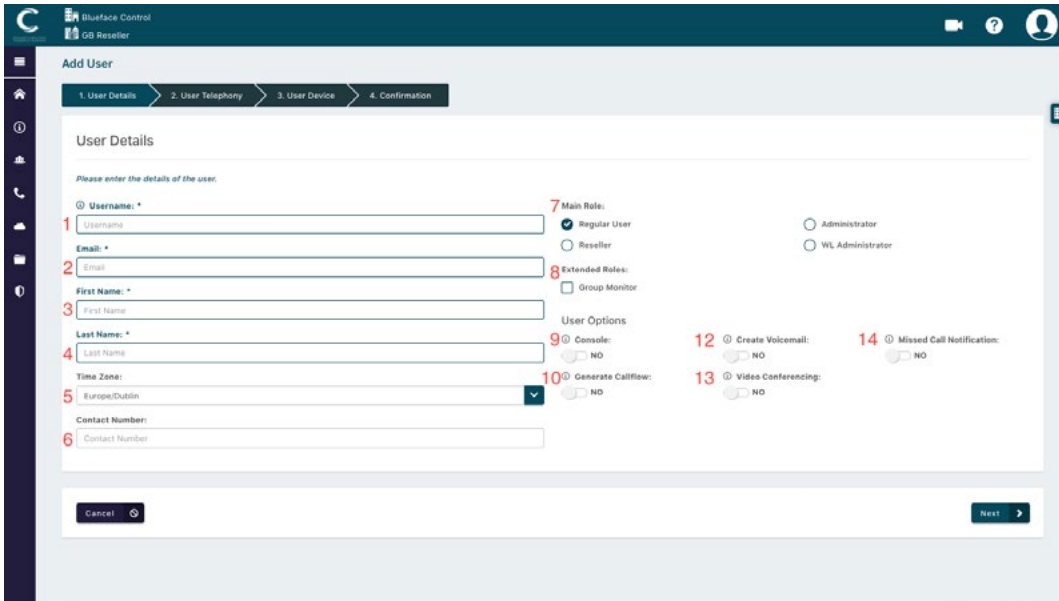**A** From the dashboard screen, using the menu, select **'People'** followed by **'Users'**.
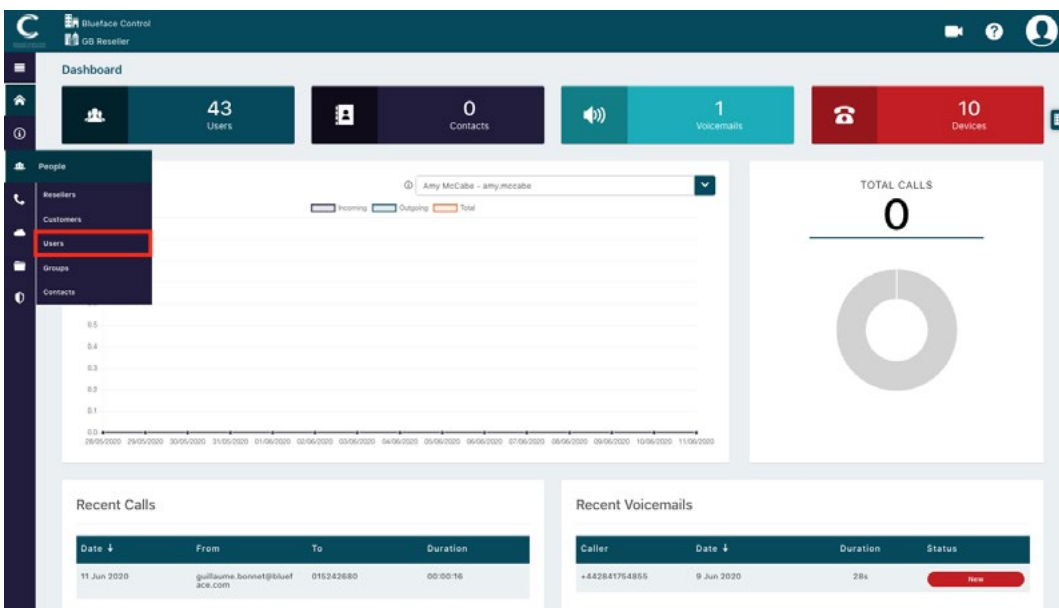
B This will then populate the users section, from here please select the **'Add User +'** button:

C Clicking on the **'Add User'** button will bring you to the Add User section.

1. Username	Enter the chosen username for this user. **Please note:** usernames must have 6-32 characters, can include uppercase, lowercase, numbers and dots – we advise Firstname.Lastname
2. Email	Enter the email address attached to this user: this must be a valid email address for many reasons, email addresses cannot be duplicated
3. First name	Enter the user's first name
4. Last name	Enter the user's last name
5. Time zone	From the dropdown menu, please select the time zone applicable to the user
6. Contact number	Enter an alternative contact number for the user, e.g. a mobile number
7. Main role	From the options, select the role you wish to apply to the user
8. Extended role	From the options, select the extended role(s) you wish to apply to the user
9. Send email notification	Check to send a welcome email (which includes a link to the portal, credentials to log in etc.)
10. Generate callflow	Check to automatically create a ring callflow for the user
11. Create voicemail	Check to automatically create and link voicemail box to the user (this will also add a voicemail element to the above mentioned callflow)
12. Console	Check to grant user access to the console feature
13. Missed call notification	Check to enable a notification via the user's email when they have missed a call

D Once you are happy all the user details are correct, please click **'Next'** to move to the **'User Telephony'** tab.

1. Caller ID name internal	Enter the name you wish to appear for the user when they call internally
2. Caller ID name external	Enter the name you wish to appear for the user when they call externally
3. Caller ID number internal	From the dropdown menu, select an already created internal number to assign to this user, alternatively '+' to create and allocate a new internal number
4. Caller ID number external	From the dropdown menu, select from the list of external numbers on the account to display as the caller ID
5. Country	From the dropdown menu, select the country the user is to be situated in
6. Call recording	From the dropdown menu, please select if and how call recording is to be applied to the user
7. Local prefix	From the dropdown menu, please select the prefix of the area the user is situated in
8. Location	From the dropdown menu of created locations, please select the location of the user, alternatively '+' to create and allocate a new location
9. CLIR (calling line identification restriction)	Enable to set the user's caller ID number external to 'Unknown/Anonymous'
10. Incoming fax format	Please select from the two available formats which format they would like to receive their incoming fax in where applicable
11. Can send fax	Enable to allow the user to avail of the fax to email service
12. Call barring	From the available options, please select which (if any) calls are to be restricted for this user

E Once you are happy all the user telephony details are correct, please click **'Next'** to move to the **'User Device'** tab.

F On the 'User Device' tab, click on **'Allocate'** to populate a list of available (unallocated already) devices on the account to choose from.
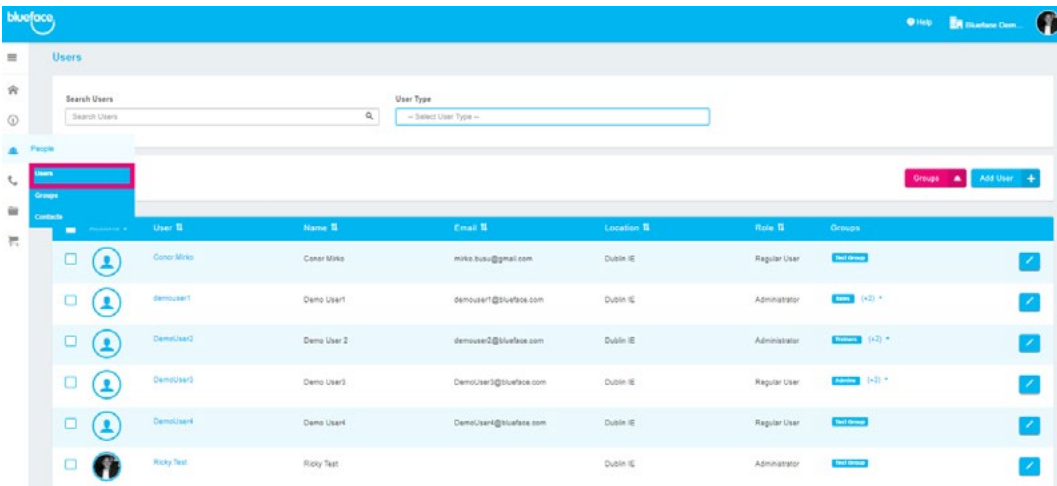
G Once you have allocated the chosen device to the user, please click **'Next'** to move to the **'Confirmation'** tab.
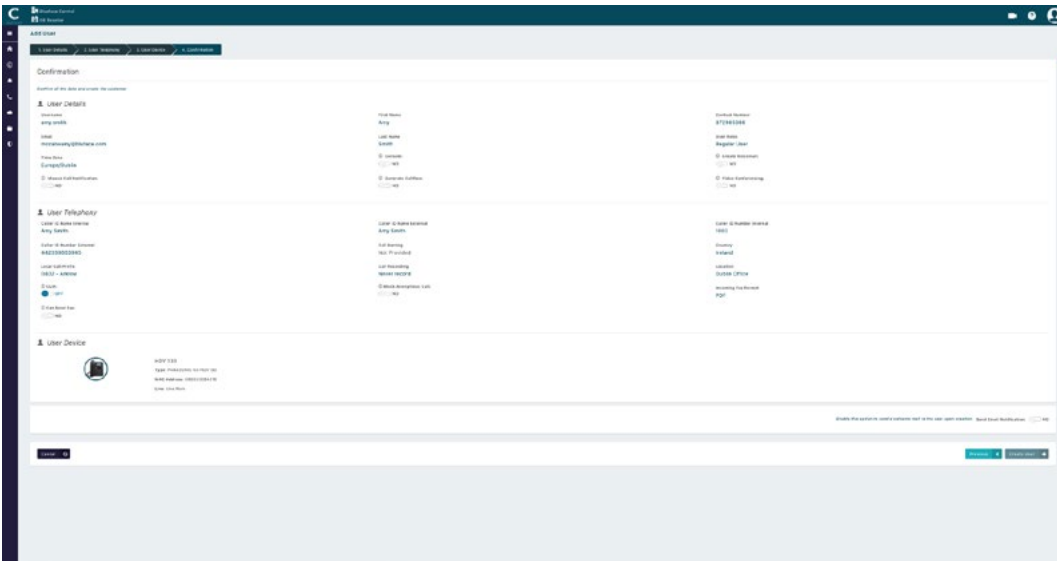
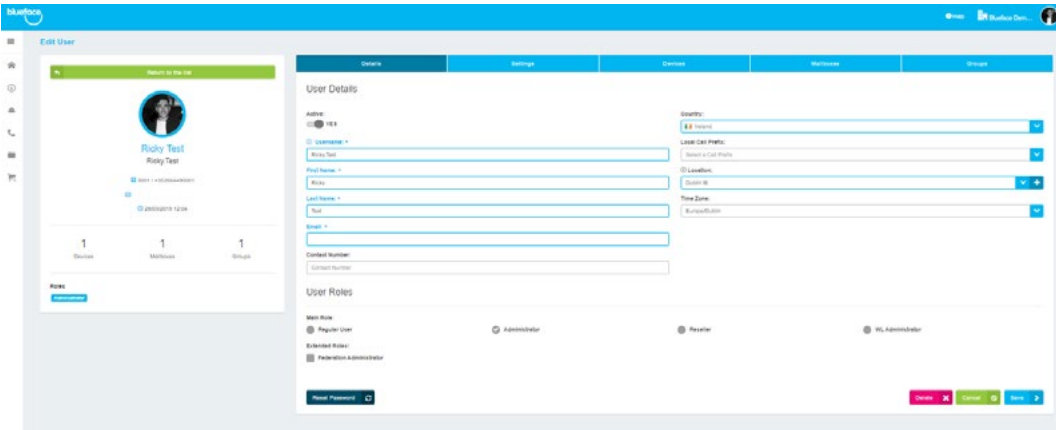**H** Once details are confirmed, click **'Create User'** to add this user to the portal.

EDIT USER SETTINGS

The newly added user (and all other users) are listed under **'People'** followed by user's submenu.

A To edit the user settings, click on the **'Edit'** icon ✏ beside the user's name you wish to edit.

B   This will populate the edit user page.

C   From here you can manage and edit the user's settings.

D   Once you are satisfied with the changes, click on the **'Save'** button to apply the changes.

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USEFUL CONTACTS

To set up partner or customer accounts on
Westcoast Cloud Voice portal please email:
admin@westcoastcloud.co.uk

For sales info: **voice@westcoastcloud.co.uk**,
or support: **support@westcoastcloud.co.uk**