



# Grandstream Networks, Inc.

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UCM6xxx Series

**User Portal Guide**



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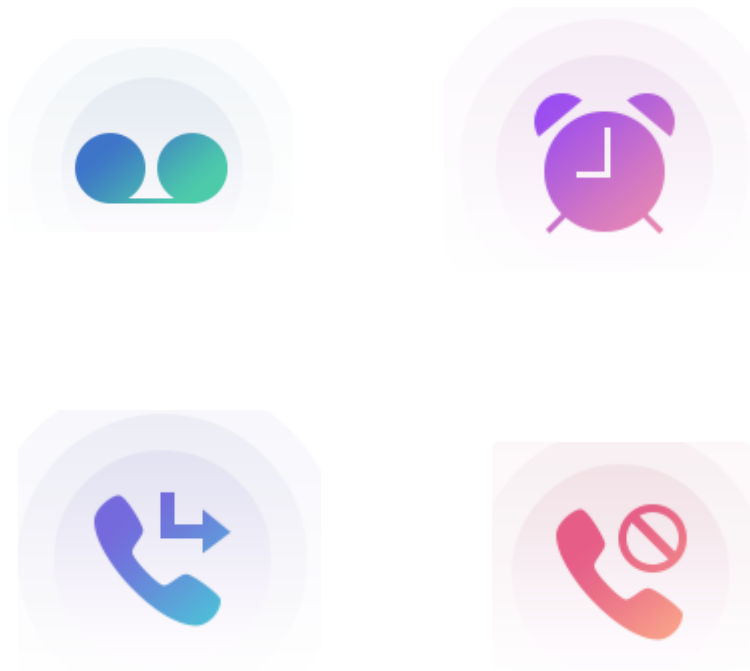
## INTRODUCTION

Other than the web interface access for administrators, Grandstream UCM6xxx IP-PBX series offer to each extension a “User Portal” allowing to manage extension own data and information by the user from the web UI with no need of administrator intervention. Using the User Portal will reduce administrator interventions to the system for basic extension operations which will be managed by the extension owner directly.

A user portal account is automatically available upon extension creation and is designed to give access to a variety of features covering user information, extension configuration, CDR (Call Detail Records), and value-added features such as Fax Sending, Call Queue, wakeup Service and CRM (Customer relationship management). These features are categorized into 3 main menus: Basic Information, Personal Data and Value-added Features.

**Note:** UCM6XXX series include UCM620x series, UCM630x series, UCM630xA series and UCM6510.

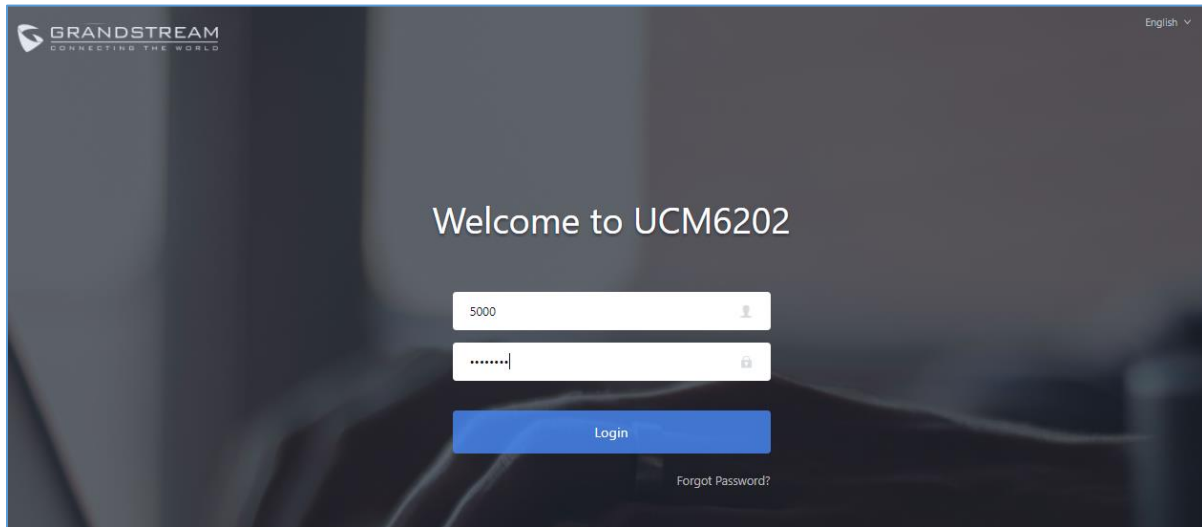
This document introduces the user portal features and offers step by step instructions to use them.



## LOGIN TO THE USER PORTAL

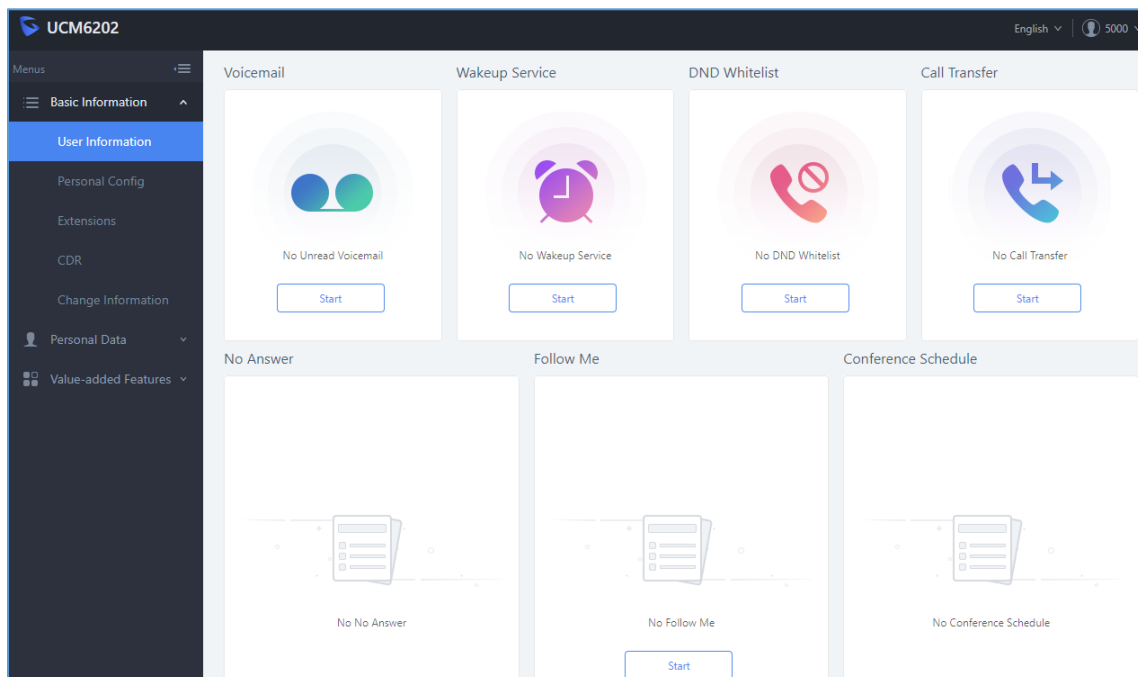
After creating an extension, the super Administrator can configure/edit the login credentials for the user portal under UCM6xxx Web GUI → **Maintenance** → **User Management** → **User Information**.

Users will use only their extension number and the password set by the admin to access to the user portal as shown in below figure.



**Figure 1: User Portal Login**

The UCM6xxx User Portal Web GUI appears once you click “Login”. The following figure shows the user portal interface:



**Figure 2: User Portal Layout**



## BASIC INFORMATION

Basic Information menu includes following sub-menus:

- User Information.
- Personal Config.
- Extensions.
- CDR (Call Detail Records).
- Change Information.

### User Information

User Information page displays the extension call features statuses including Voicemail, DND whitelist, Call Transfer, No Answer, Follow Me, and Conference Schedule.

The user can press **Start** button to enable and configure a call feature directly.

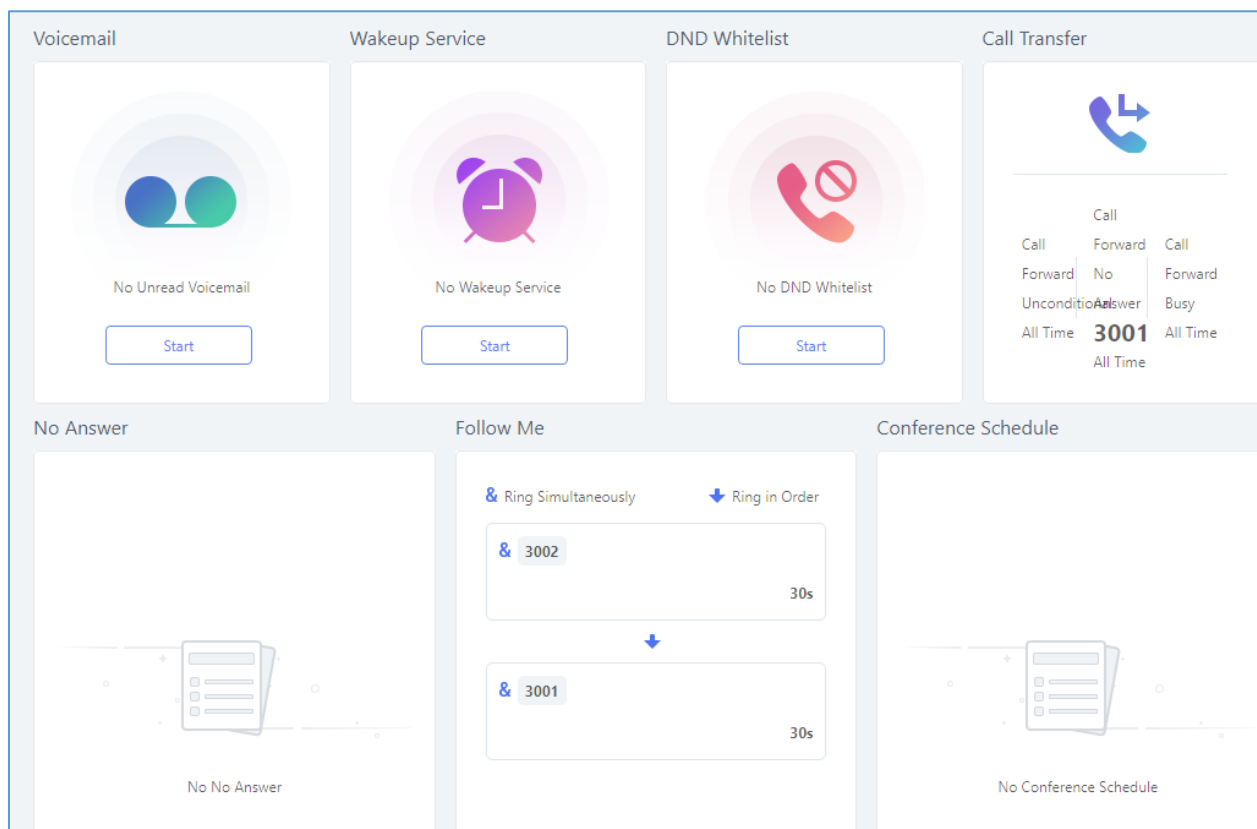


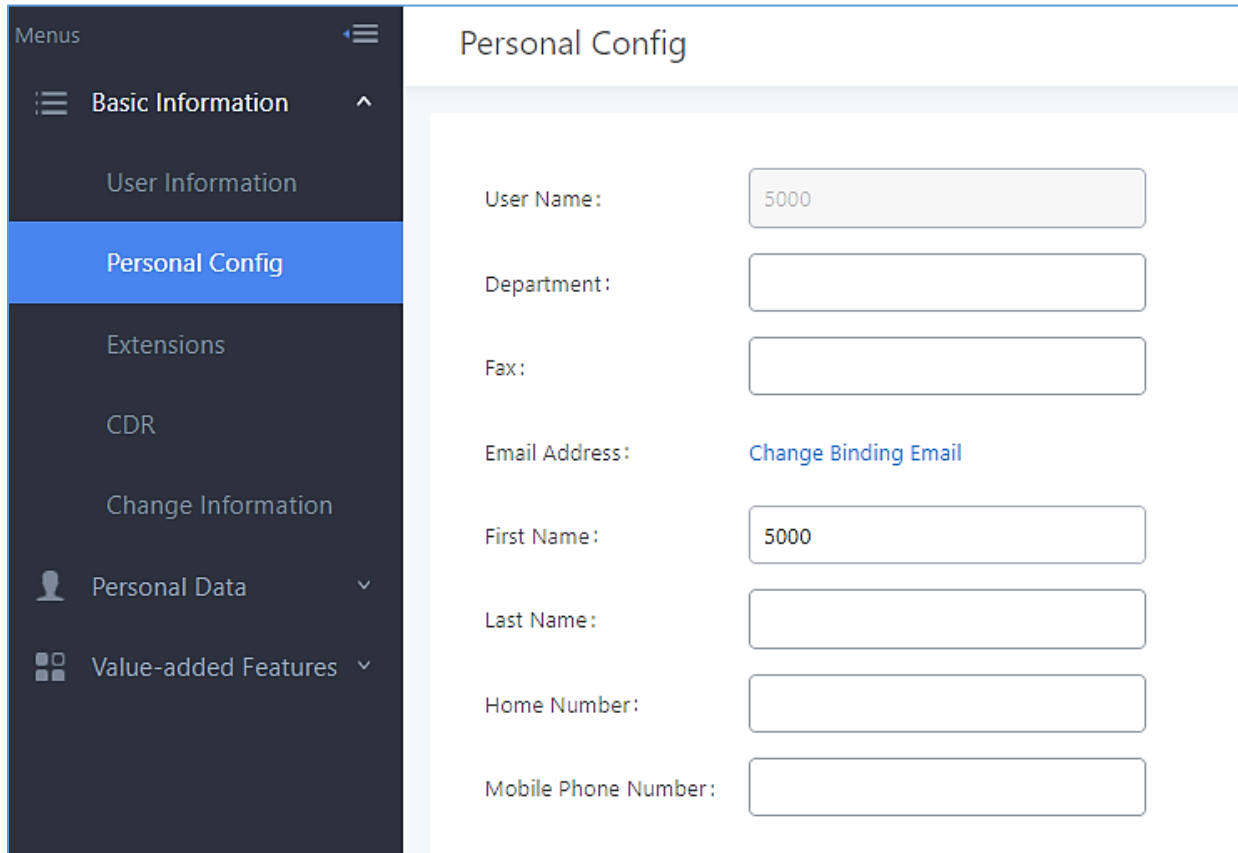
Figure 3: Basic Information → User Information



## Personal Config

Personal Config page allows the user to edit his/her personal information including Department, Fax Number, Email Address, First Name, Last Name, Home Number and Mobile Phone Number.

The “User Name” cannot be edited from the User Portal. Only Admin can edit this field if needed.



The screenshot displays the 'Personal Config' page. On the left, a dark sidebar menu contains the following items: 'Basic Information' (expanded), 'User Information', 'Personal Config' (highlighted in blue), 'Extensions', 'CDR', 'Change Information', 'Personal Data', and 'Value-added Features'. The main content area is titled 'Personal Config' and contains a form with the following fields:

- User Name: 5000
- Department: [Empty text box]
- Fax: [Empty text box]
- Email Address: [Change Binding Email](#)
- First Name: 5000
- Last Name: [Empty text box]
- Home Number: [Empty text box]
- Mobile Phone Number: [Empty text box]

Figure 4: Basic Information → Personal Config

## Extensions

Extension page is divided into 3 tabs as follows:

1. **Basic Settings:** Allows to:
  - Change the SIP Extension Password and Authentication ID.
  - Enable/Disable Voicemail and set the Voicemail Password.
  - Enable/Disable the extension.
  - Select the extension prompts language.



Extension Information

Basic Settings
Features
Specific Time

General

<p>* Extension: <input style="width: 150px;" type="text" value="1000"/></p> <p>AuthID: <input style="width: 150px;" type="text"/></p> <p>* Voicemail Password: <input style="width: 150px;" type="text" value="1802"/></p> <p>Disable This Extension: <input type="checkbox"/></p>	<p>* SIP/IAX Password: <input style="width: 150px;" type="text" value="hY9d6D1vdIBhy4x"/></p> <p>Enable Voicemail: <input checked="" type="checkbox"/></p> <p>Skip Voicemail Password <input type="checkbox"/></p> <p>Verification:</p> <p>* Language: <input style="border: none; border-bottom: 1px solid #ccc; text-align: right; font-size: small; color: #666; padding-right: 5px;" type="text" value="Default"/> <span style="font-size: 1.2em;">v</span></p>
--	---

**Figure 5: Basic Information → Extensions → Basic Settings**

2. **Features:** The extension configuration parameters in this menu provide the user with a variety of call features to perform, such as:

- **Presence:** Set up presence status of the extension (6 statuses are available).
- **Call Transfer:** Configure call forward for each presence status. (Call Forward Unconditional, Call Forward No Answer, Call Forward Busy and FWD Whitelist).
- **Do Not Disturb:** Enable/Disable DND feature and configure its conditions including DND Whitelist.
- **Ring Simultaneously:** Enable/Disable “Ring Simultaneously” feature and configure its conditions.
- **Seamless transfer privilege control:** Select the extensions that can perform seamless transfer to the user’s extension.
- **Ring Timeout:** Configure the ring time out parameter for the extension.





Extension Information Save Cancel

Basic Settings **Features** Specific Time

---

Call Transfer

Presence Status: Available ▾

Available
  Away
  Chat
  Custom Presence Status
  Unavailable

Call Forward	<span>None</span> ▾	CFU Time Condition:	<span>All Time</span> ▾
Unconditional:			
Call Forward No Answer:	<span>None</span> ▾	CFN Time Condition:	<span>All Time</span> ▾
Call Forward Busy:	<span>None</span> ▾	CFB Time Condition:	<span>All Time</span> ▾

Do Not Disturb:  \* DND Time Condition: All Time ▾

**Figure 6: Basic Information → Extensions → Features**

- Specific Time:** User can configure specific time for his extension to use time condition based features.

Extension Information Save Cancel

Basic Settings Features **Specific Time**

---

Time: Start Time ⌚ - End Time ⌚

Frequency:  By Week  By Day

Sun
  Mon
  Tue
  Wed
  Thu
  Fri
  Sat

+ Add

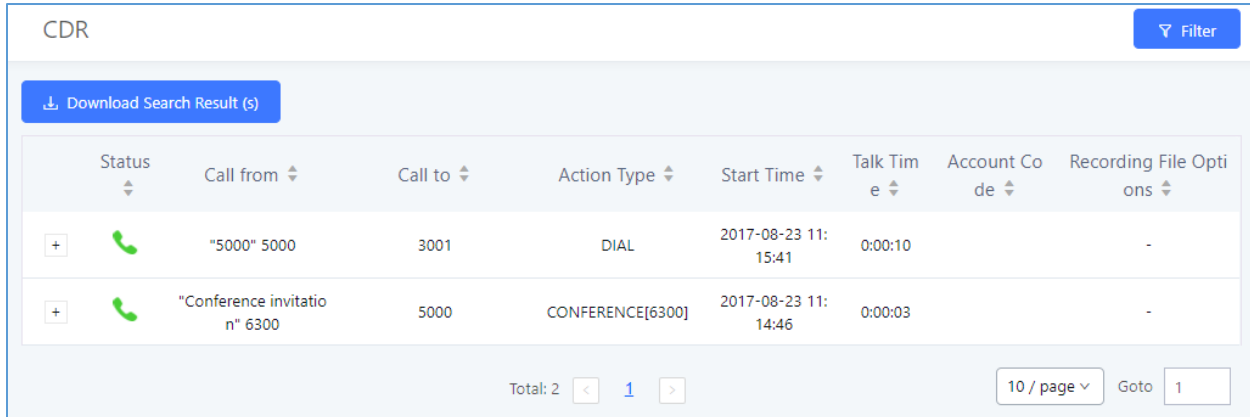
Time	Week	Month	Day	Options
------	------	-------	-----	---------



**Figure 7: Basic Information → Extensions → Specific Time**



## CDR (Call Detail Records)

The CDR page provides to the user all the call records details related to his extension.



Status	Call from	Call to	Action Type	Start Time	Talk Time	Account Code	Recording File Options
+ 	"5000" 5000	3001	DIAL	2017-08-23 11:15:41	0:00:10		-
+ 	"Conference invitation" 6300	5000	CONFERENCE[6300]	2017-08-23 11:14:46	0:00:03		-

Total: 2 < 1 > 10 / page Goto 1

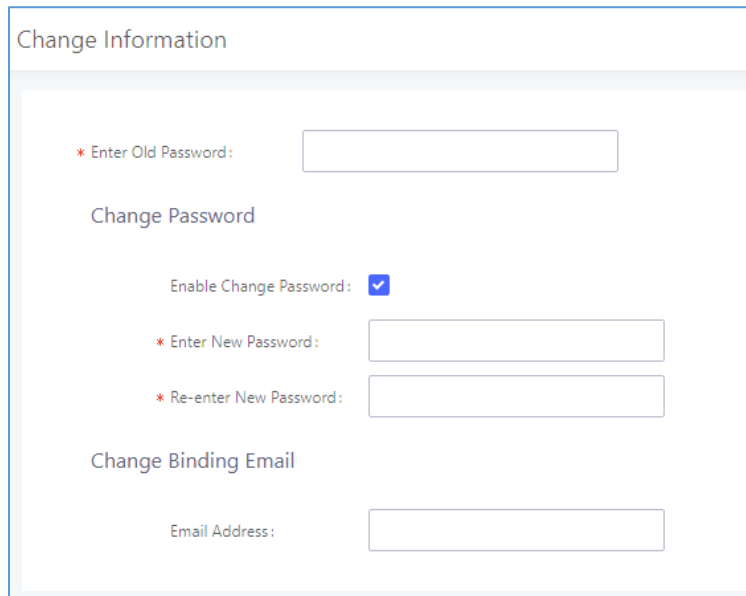
**Figure 8: Basic Information → CDR**

### Notes:

- User can also filter records by: start/end time, Caller Number/Name, Call Number, Action Type, Call Type, and Status. Click on **Filter** button to have the filtering menu and once the criteria are set then click on **Filter** button in order to process the request and get the desired result.
- User can also download all his CDR records in an excel file from the user portal.

## Change Information

User can easily change the user portal password by entering the old one already set by the administrator and setting a new one. In addition to this, user Email Address can also be set or modified in this menu.



Change Information

\* Enter Old Password:

Change Password

Enable Change Password:

\* Enter New Password:

\* Re-enter New Password:

Change Binding Email

Email Address:

**Figure 9: Basic Information → CDR**



## PERSONAL DATA

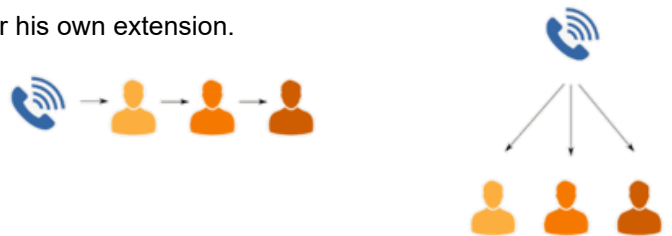
Personal Data menu includes following sub-menus:

- Follow Me.
- Voicemail.
- Recording Files.
- Fax Files.

### Follow Me

This page allows the user to configure Follow Me feature for his own extension.

Follow Me is a very useful feature to locate a user by ringing different extensions and external numbers in a pre-defined order. This feature allows users to be reached at numerous devices, such as mobile, home-telephone, office-telephone, or softphones.



Follow Me User Preference
Save

Enable:

Music On Hold Class:

Enable Destination:

\* Default Destination:

Skip Trunk Auth:

Confirm When Answering:

**Follow Me Numbers**

New Follow Me Number:  Dial Local Extension  Dial External Number

for  (seconds)



Dialing Order:  Ring after trying previous extension/number  Ring along with previous extension/number

+ Add



Extension	Options
3002 for 30 (seconds)	
3100 for 30 (seconds)	

Figure 10: Personal Data → Follow Me

## Voicemail

User can view all the voicemails he received under the UCM6xxx portal Web GUI → **Personal Data** → **Voicemail**. He can download them as well by clicking on , delete them by clicking on  or Mark them as Read by clicking on the **Mark as Read** button.



Voicemail					
<b>Voicemail Prompt</b>		<b>Mark as Read</b>			
<input type="checkbox"/>	Name ↕	CallerID Number ↕	Date ↕	Size ↕	Options
<input type="checkbox"/>	Unread	3000	2017-08-28 11:52:48 UTC-04:00	12.69 KB	 

Total: 1   / page Goto

**Figure 11: Personal Data → Voicemail**

User can also customize his Voicemail greetings by uploading a custom prompt for each greeting message. To do so, user needs to click on **Voicemail Prompt** and upload a prompt for each status.

### Notes:

- Available voicemail prompts are:
  - **Busy**: This voicemail prompt will be played when the callee is in another call or is in DND mode.
  - **Unavail**: This voicemail prompt will only be played when the callee's extension is unregistered.
  - **Temp**: Highest priority. This voicemail prompt will be played in all scenarios when it is configured (unregistered, unanswered/ring timeout, busy, DND).
  - **Greet**: This voicemail prompt will be played when the callee does not answer within their ring timeout period.

**The priority is “temp > busy/unavail > greet”.**

- Sounds file must be PCM encoded, 16 bits at 8000Hz mono with mp3/wav format or raw ulaw/alaw/gsm file with .mp3/.wav/.ulaw/.alaw/.gsm suffix. The file size must be less than 5MB.




Voicemail Prompt Cancel

Voicemail prompt will be played when user enters voicemail. "busy" indicates the extension is busy, "unavail" indicates the extension is unavailable. Priority: temp > busy/unavail > greet  
 Sound file must be PCM encoded, 16 bits at 8000Hz mono with mp3/wav format, or raw ulaw/alaw/gsm file with .mp3/.wav/.ulaw/.alaw/.gsm suffix. The file size must be less than 5MB.




Busy:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
Greet:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
Temp:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>
Unavail:	<input type="button" value="Choose file to upload"/>	<input type="button" value="Download"/>	<input type="button" value="Delete"/>

**Figure 12: Personal Data → Voicemail – Voicemail Prompt**

## Recording Files

From this menu, the user can find all the Extension Call Recordings under the UCM6xxx portal Web GUI → **Personal Data → Recording Files**, with the possibility of playing them on the user portal interface by clicking  button or download them to his personal computer.





Recording Files					
Caller	Callee	Call Time	Size	Options	
5000	3001	2017-08-24 04:21:32 UTC-04:00	194.42 KB		 





10 / page ▾

**Figure 13: Personal Data → Recording Files**

## Fax Files

User can view all the faxes he received under the UCM6xxx portal Web GUI → **Personal Data → Fax Files**. He also can download the files by clicking on , or delete them with the button .



Fax Files				
<input type="checkbox"/>	Name ↕	Date ↕	Size ↕	Options
<input type="checkbox"/>	VFAX-5000-20170828-110103-1503932444.50.pdf	2017-08-28 11:01:25 UTC-04:00	1573	 
<input type="checkbox"/>	VFAX-5000-20170828-110103-1503932444.50.tiff	2017-08-28 11:01:20 UTC-04:00	5871	 

Total: 2   
10 / page ▾ Goto

**Figure 14: Personal Data → Fax Files**

**Note:** Two copies of each fax file are available, one in .pdf format and a second in .tiff format.



## VALUE-ADDED FEATURES

Value-added Features menu includes following sub-menus:

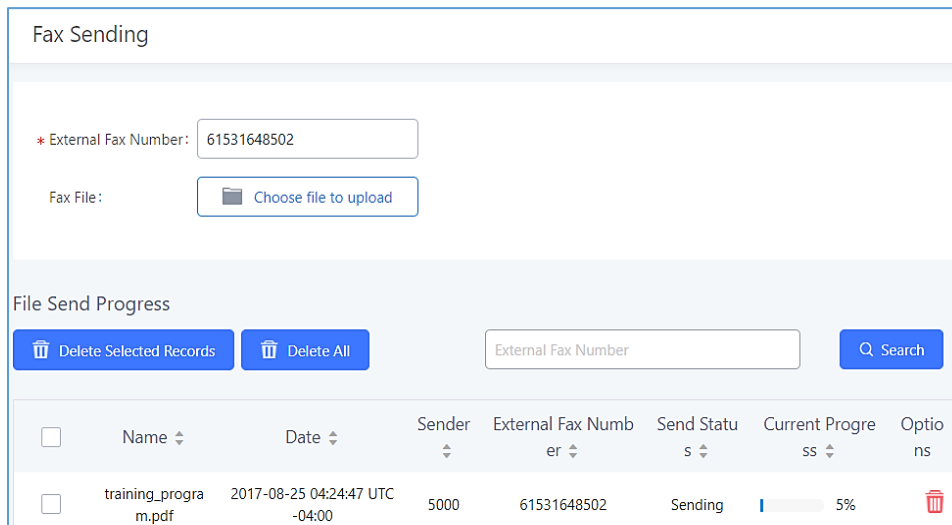
- Fax Sending.
- Call Queue.
- Wakeup Service.
- CRM User Settings.

### Fax Sending

This page provides ability to send PDF or TIF/TIFF fax files to external fax destination.

The steps below describe the basic configuration required to send a fax to an external fax number:

1. Go to UCM6xx User Portal GUI → **Value-added Features** → **Fax Sending**.
2. Enter the destination “External Fax Number”.
3. Click on “Choose file to upload” and Select the file you want to send.



The screenshot displays the 'Fax Sending' page. At the top, there is a form with an 'External Fax Number' field containing '61531648502' and a 'Fax File' field with a 'Choose file to upload' button. Below this is the 'File Send Progress' section, which includes 'Delete Selected Records' and 'Delete All' buttons, an 'External Fax Number' search box, and a 'Search' button. A table below shows the progress of a fax send:

<input type="checkbox"/>	Name	Date	Sender	External Fax Number	Send Status	Current Progress	Options
<input type="checkbox"/>	training_program.pdf	2017-08-25 04:24:47 UTC -04:00	5000	61531648502	Sending	5%	

**Figure 15: Value-added Features → Fax Sending**

#### Notes:

- Only PDF or TIF/TIFF files are accepted.
- The “File Send Progress” field shows all the information about the faxes that have been sent and gives to the user an idea about the percentage of the fax current progress.

### Call Queue

As member of a call queue, the user can manage his calls from the user portal. The page also provides a user dashboard displaying waiting calls and call statistics.



The following figure shows the Switchboard seen by the user 5000 who is a queue agent and can see only his own information under the user portal.

Call Queue					
<a href="#">6500 (Extensions)</a>					
Waiting			Proceeding		
Status	Caller	Callee	Position	Talk Time	Options
	3000	6500	1	2017-08-25 06:44:34	
Status	Caller	Callee	Talk Time	Options	
	3003	5000	2017-08-25 06:47:08		

Figure 16: Value-added Features → Call Queue

<b>Waiting</b>	This menu shows the current waiting calls along with the caller id and the option to hang-up call by pressing on the  button.
<b>Proceeding</b>	Shows the current established calls along with the caller id and the callee (agent) as well as the option to hang-up or to transfer the call using the  button.
<b>Agents</b>	Displays the agent extension status (idle, ringing, in use or unavailable) along with some basic call statistics and agent's type (static or dynamic).

## Wakeup Service

User can schedule a reminder or wake up calls to its extension using the UCM6xxx user portal.



Please refer to the following steps:

1. Login to the user portal on the UCM6.
2. WakeUp service can be found under **“Value-added Features → Wakeup Service”**, click on [+ Create New Wakeup Service](#) to create a new wakeup service.
3. Configures the Name, Prompt, Date and Time for the user to make the wakeup to.
4. Click [Save](#) and [Apply Changes](#) to apply the changes.



Create New Wakeup Service Save

---

Enable Wakeup

Service:

\* Name:

\* Extension:

Prompt:

Custom Date:

\* Date:

\* Time:

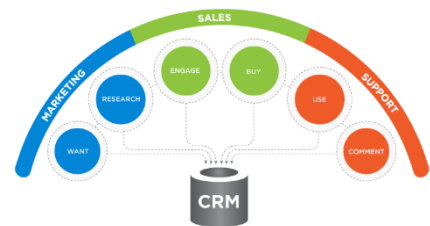
**Figure 17: Value-added Features → Wakeup Service**

**Table 1: Wakeup Service Parameters**

<b>Enable Wakeup Service</b>	Enable Wakeup service.
<b>Name</b>	Enter a name to identify the wakeup service.
<b>Prompt</b>	Select the prompt to play for that extension.
<b>Custom Date</b>	If disabled, users can select a specific date and time. If enabled users can select multiple days of the week to perform the wakeup.
<b>Date</b>	Select the date or dates when to performs the wakeup call.
<b>Time</b>	Select the time when to play the wakeup call.
<b>Members</b>	Select the members involved within the wakeup group.

## CRM User Settings

User can start using CRM feature once settings on admin access are configured with supported CRM platforms (currently only SugarCRM and Salesforce are supported).



Refer to the following steps to Login to CRM account:

1. Navigate under UCM6xxx portal GUI → **Added-Value Features** → **CRM User Settings**
2. Click on Enable CRM.
3. Enter the Username associated with CRM Account.
4. Enter the Password associated with CRM Account.
5. Click on “Save” and “Apply Changes”.





### CRM User Settings

Enable CRM:

\* Username:

\* Password:

Login Status:

**Figure 18: Value-added Features → CRM User Settings**

The status will change from “Logged Out” to “Logged In” and the user can start then using CRM features.

