



Grandstream Networks, Inc.

UCM6xxx Series

User Portal Guide



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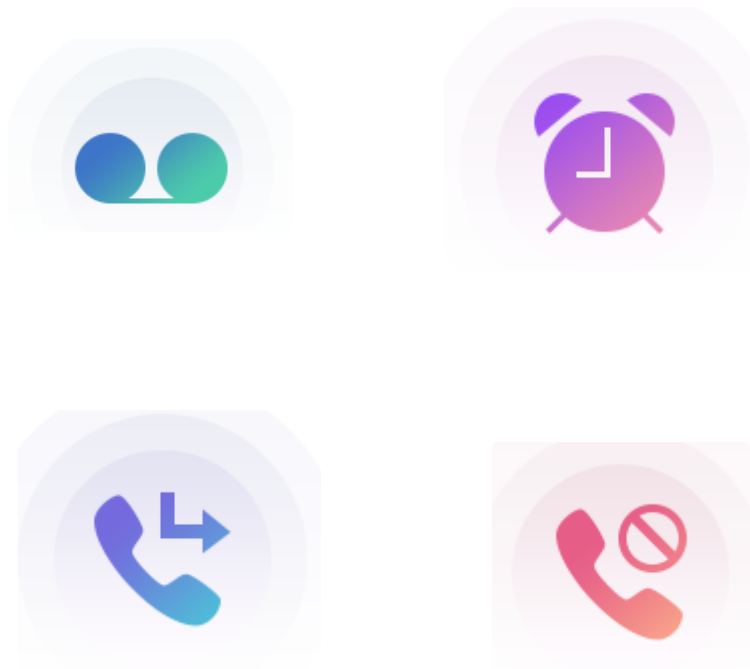


INTRODUCTION

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.

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.

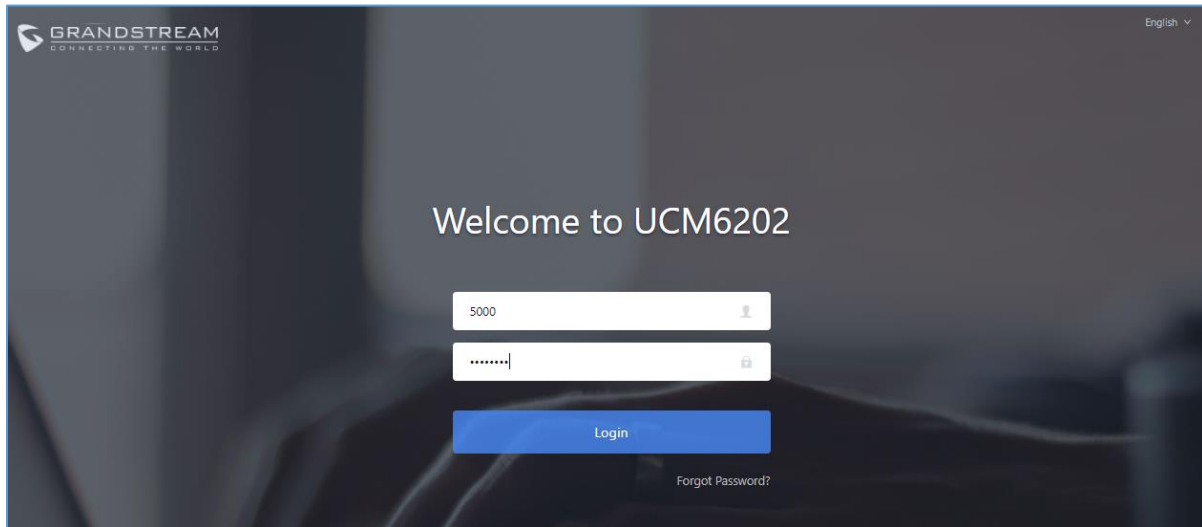


Figure 1: User Portal Login

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

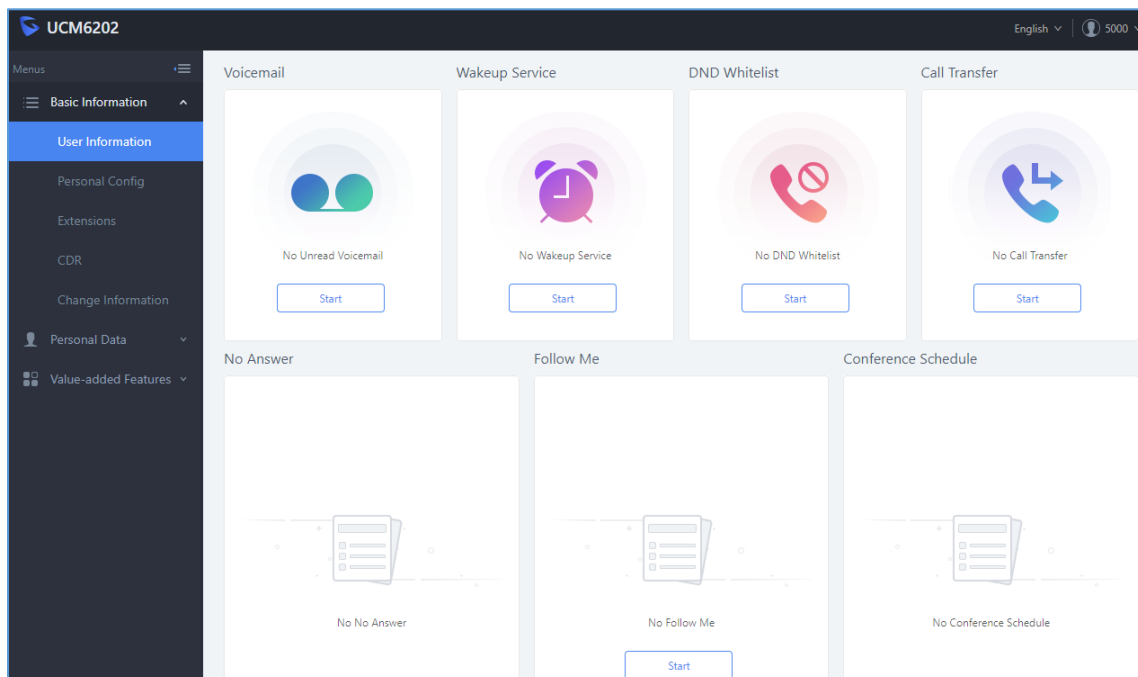


Figure 2: User Portal Layout



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.

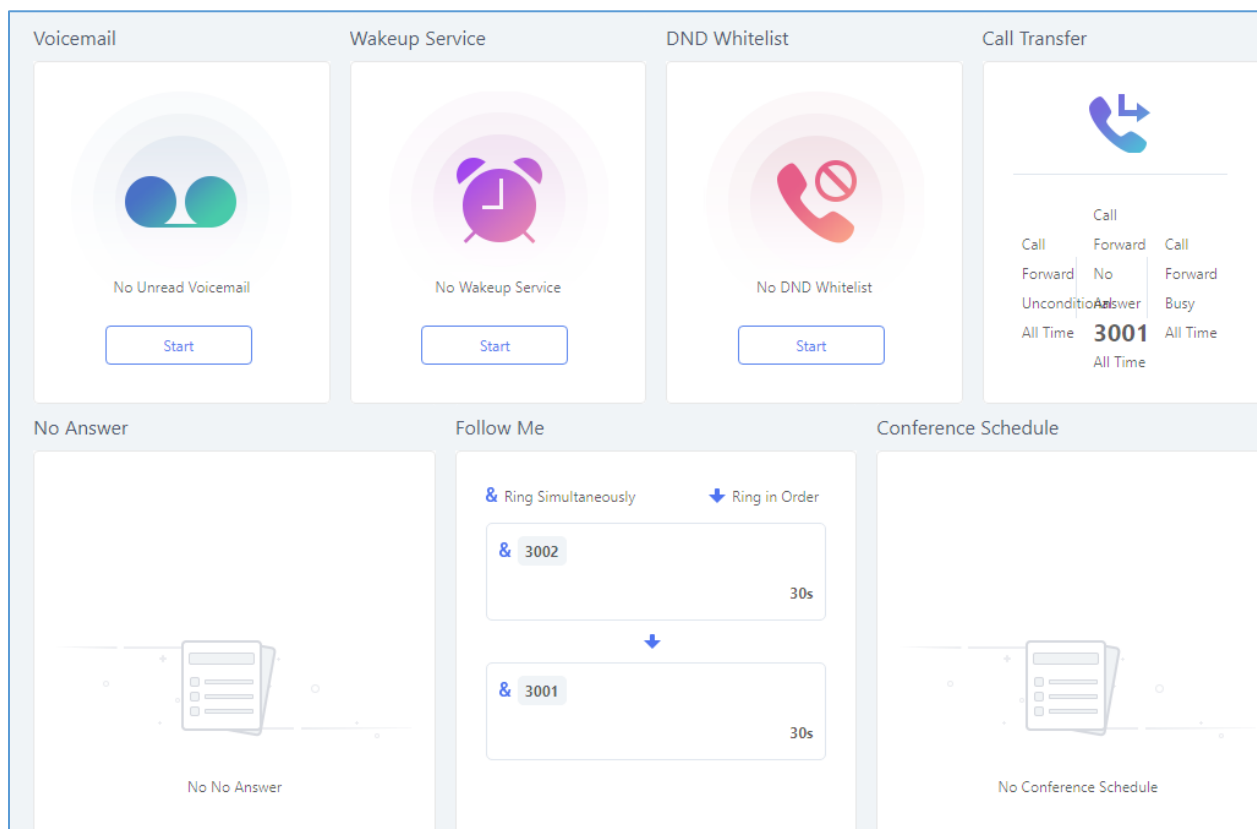


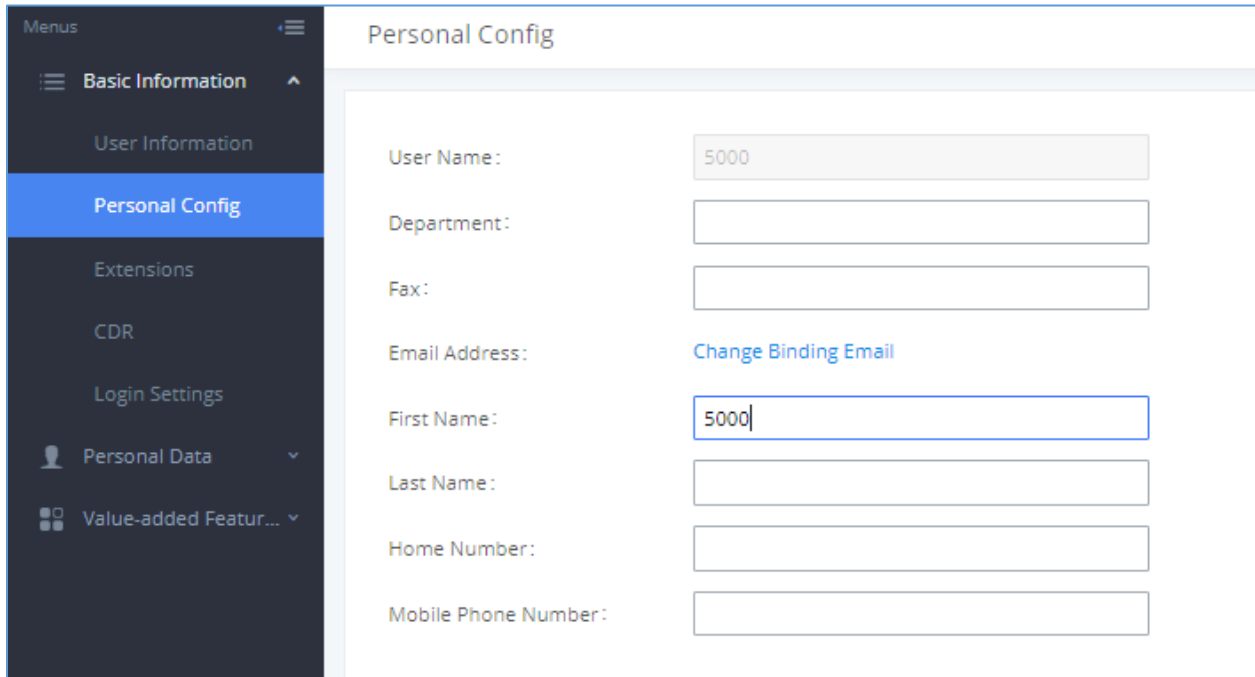
Figure 3: Basic Information → User Information



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 is a dark sidebar menu with the following items: 'Menus', 'Basic Information', 'User Information', 'Personal Config' (highlighted in blue), 'Extensions', 'CDR', 'Login Settings', 'Personal Data', and 'Value-added Featur...'. The main content area is titled 'Personal Config' and contains the following fields:

- User Name: 5000 (disabled)
- 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.
 - Select the extension prompts language.



Extension Information

Basic Settings Features Specific Time Cancel Save

General

<p>* Extension: <input type="text" value="5000"/></p> <p>AuthID: <input type="text"/></p> <p>* Voicemail Password: <input type="text" value="073200"/></p> <p>Send Voicemail to Email: <input type="text" value="Default"/></p> <p>* Language: <input type="text" value="Default"/></p>	<p>* SIP/IAX Password: <input type="text" value="5xEG^L"/></p> <p>Voicemail: <input type="text" value="Local Voicemail"/></p> <p>Skip Voicemail Password: <input type="checkbox"/></p> <p>Verification: <input type="text"/></p> <p>Keep Voicemail after: <input type="text" value="Default"/></p> <p>Emailing: <input type="text"/></p> <p>Enable SCA: <input type="checkbox"/></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.
- **FWD Whitelist:** defines users in the forward whitelist that their call will not be forwarded.
- **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

Basic Settings **Features** Specific Time Cancel Save

Presence Status:

Available Away Chat Custom Presence Status Unavailable

Call Forward Unconditional: CPU Time Condition:

Call Forward No Answer: CFN Time Condition:

Call Forward Busy: CFB Time Condition:

Do Not Disturb: * DND Time Condition:

FWD Whitelist: +
[Add FWD Whitelist](#) +

Ring Simultaneously

Ring Simultaneously: External Number:

* Time Condition for Ring Simultaneously: Use callee DOD on FWD or RS:

Seamless transfer privilege control

Allowed to seamless transfer: 8 Items Available 0 Item Selected

Available	Selected
<input type="checkbox"/> 1000 "John Doe"	
<input type="checkbox"/> 1001	
<input type="checkbox"/> 1002	
<input type="checkbox"/> 1003 "Chris"	
<input type="checkbox"/> 1004 "Carmen"	
	None

Other Settings

Ring Timeout:

Figure 6: Basic Information → Extensions → Features

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

Extension Information

Basic Settings Features **Specific Time** Cancel Save

Time: -

Frequency: By Week By Month

Sun	Mon	Tue	Wed
Thu	Fri	Sat	

Add

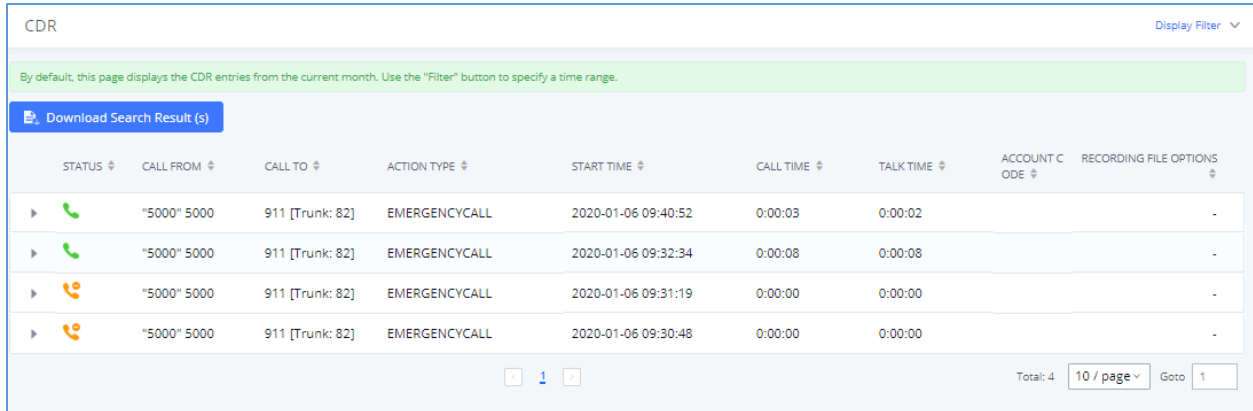
TIME	WEEK	MONTH	DAY	OPTIONS

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	CALL TIME	TALK TIME	ACCOUNT CODE	RECORDING FILE OPTIONS
▶	"5000" 5000	911 [Trunk: 82]	EMERGENCYCALL	2020-01-06 09:40:52	0:00:03	0:00:02		-
▶	"5000" 5000	911 [Trunk: 82]	EMERGENCYCALL	2020-01-06 09:32:34	0:00:08	0:00:08		-
▶	"5000" 5000	911 [Trunk: 82]	EMERGENCYCALL	2020-01-06 09:31:19	0:00:00	0:00:00		-
▶	"5000" 5000	911 [Trunk: 82]	EMERGENCYCALL	2020-01-06 09:30:48	0:00:00	0:00:00		-

Figure 8: Basic Information → CDR

Notes:

- User can also filter records by: start/end time, Caller Number/Name, Callee Number, Action Type, Extension Group, Call Type, and Status. Click on **"Display 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 by clicking on **"Download Search Result (s)"**.

Login Settings

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.

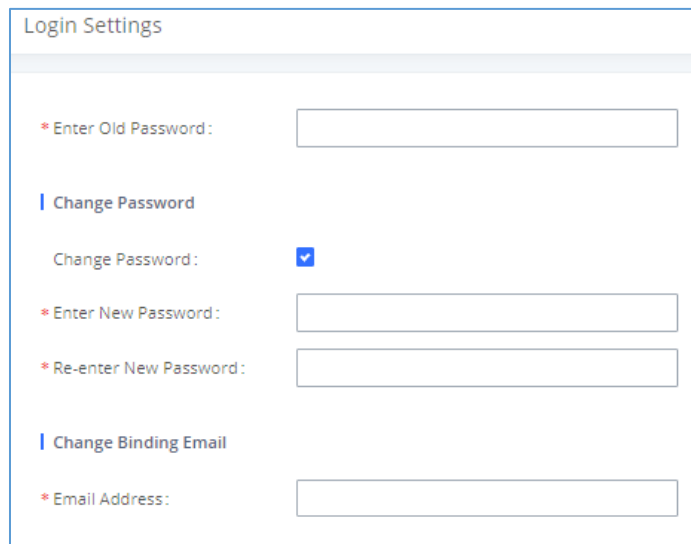


Figure 9: Basic Information → CDR



PERSONAL DATA

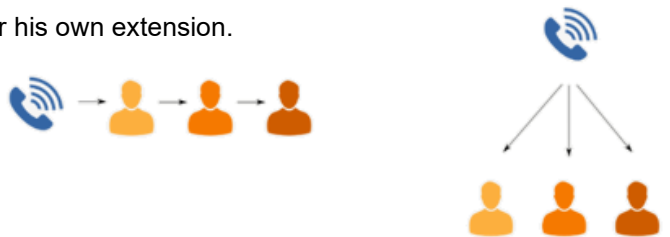
Personal Data menu includes following sub-menus:

- Follow Me
- Voicemail
- Recording Files
- Fax Files
- SCA
- Video Conference

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
Cancel Save

Enable: <input checked="" type="checkbox"/>	Skip Trunk Auth: <input type="checkbox"/>
Music On Hold Class: <input type="text" value="Default"/>	Confirm When Answering: <input type="checkbox"/>
Use Callee DOD for Follow Me: <input type="checkbox"/>	Enable Destination: <input checked="" type="checkbox"/>
* Default Destination: <input type="text" value="Voicemail"/>	<input type="text" value="1000 'John Doe'"/>

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
1001 for 30 (seconds)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
1002 for 30 (seconds)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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					
Voicemail Prompt		Mark as Read			
<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 messages 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 greetings are:
 - **Busy**: The corresponding message will be played when the extension is busy.
 - **Unavailable**: The corresponding message will be played when the extension is unavailable.
 - **Temp**: Highest priority. If exists, the corresponding message will be played.
 - **Greet**: This is the welcome message played when reaching extension VM.

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
1002	5000	2020-01-08 10:49:37 UTC-05:00	449.42 KB	  





Total: 1 10 / page Goto 1

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 1

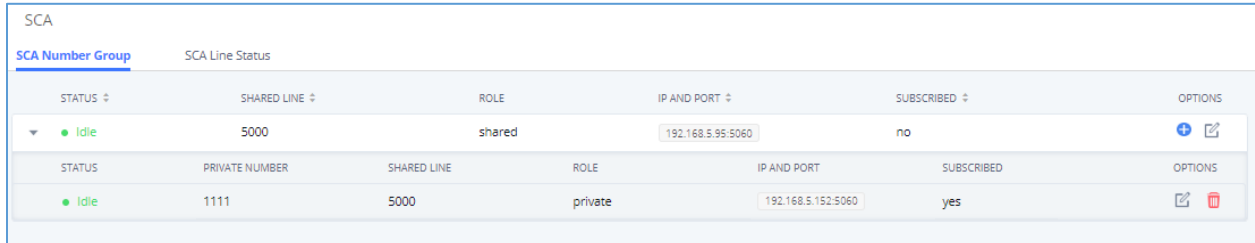
Figure 14: Personal Data → Fax Files

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



SCA

Users can view the line status from the portal Web GUI → **Personal Data** → **SCA** which shows the line status as well as remote and local calling parties information. Users can also edit their Shared Main Line to associate a private number to the shared line.

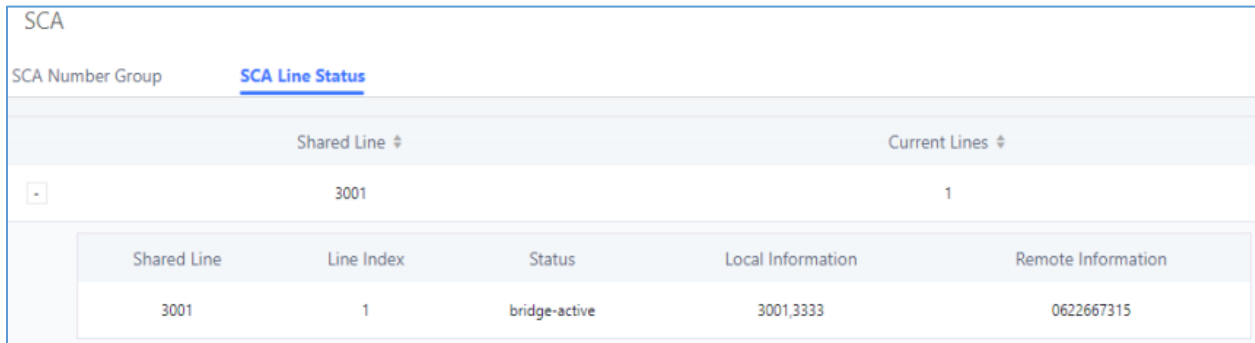


The screenshot shows the 'SCA Number Group' configuration page. It features two tabs: 'SCA Number Group' (active) and 'SCA Line Status'. Below the tabs is a table with columns: STATUS, SHARED LINE, ROLE, IP AND PORT, SUBSCRIBED, and OPTIONS. The first row shows a status of 'Idle', shared line '5000', role 'shared', IP '192.168.5.95:5060', and 'no' for subscribed. A second table below shows details for a private line with status 'Idle', private number '1111', shared line '5000', role 'private', IP '192.168.5.152:5060', and 'yes' for subscribed.

STATUS	SHARED LINE	ROLE	IP AND PORT	SUBSCRIBED	OPTIONS
Idle	5000	shared	192.168.5.95:5060	no	[+], [edit]

STATUS	PRIVATE NUMBER	SHARED LINE	ROLE	IP AND PORT	SUBSCRIBED	OPTIONS
Idle	1111	5000	private	192.168.5.152:5060	yes	[edit], [trash]

Figure 15: SCA Number Group



The screenshot shows the 'SCA Line Status' configuration page. It features two tabs: 'SCA Number Group' and 'SCA Line Status' (active). Below the tabs is a summary row with 'Shared Line' (3001) and 'Current Lines' (1). Below this is a table with columns: Shared Line, Line Index, Status, Local Information, and Remote Information. The table contains one row with shared line '3001', line index '1', status 'bridge-active', local information '3001,3333', and remote information '0622667315'.

Shared Line	Current Lines
3001	1

Shared Line	Line Index	Status	Local Information	Remote Information
3001	1	bridge-active	3001,3333	0622667315




Figure 16: SCA Line status

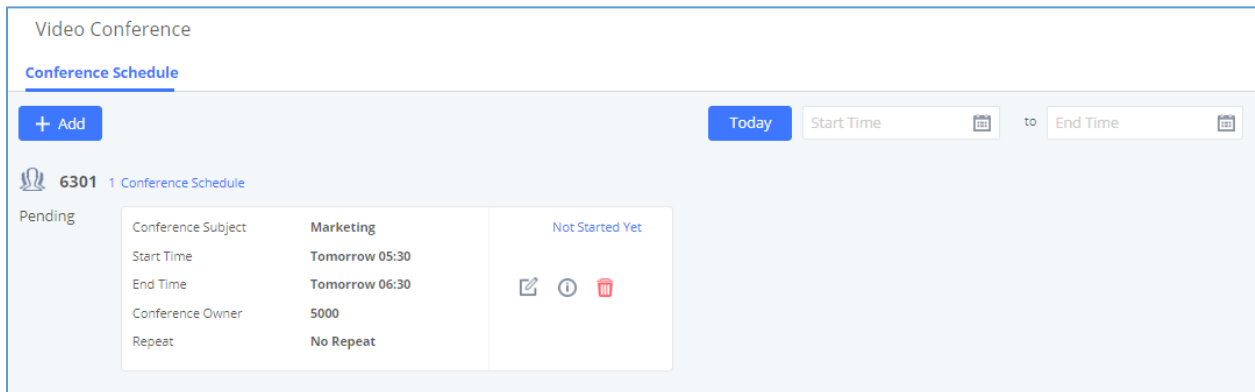
For more information regarding SCA configuration, please refer to the following guide: http://www.grandstream.com/sites/default/files/Resources/SCA_guide.pdf



Video Conference

Video Conference Schedule can be found under portal Web GUI → **Personal Data** → **Video Conference**. Users can create, edit, view and delete a Conference Schedule.

- Click on “Add” to add a new Conference Schedule.
- Click on  to edit the conference schedule.
- Click on  for details.
- Click on  to delete the conference schedule.



The screenshot shows the 'Video Conference' section of a web portal. At the top, there is a 'Conference Schedule' sub-section with a '+ Add' button on the left and a 'Today' button followed by 'Start Time' and 'End Time' fields with calendar icons. Below this, a list of conference schedules is shown. The first entry is '6301 1 Conference Schedule' with a status of 'Pending'. A details card for this entry shows: 'Conference Subject: Marketing', 'Start Time: Tomorrow 05:30', 'End Time: Tomorrow 06:30', 'Conference Owner: 5000', and 'Repeat: No Repeat'. To the right of the details card are three icons: an edit icon, an info icon, and a delete icon. The status 'Not Started Yet' is also visible.

Figure 17: Video Conference Schedule



VALUE-ADDED FEATURES

Value-added Features menu includes following sub-menus:

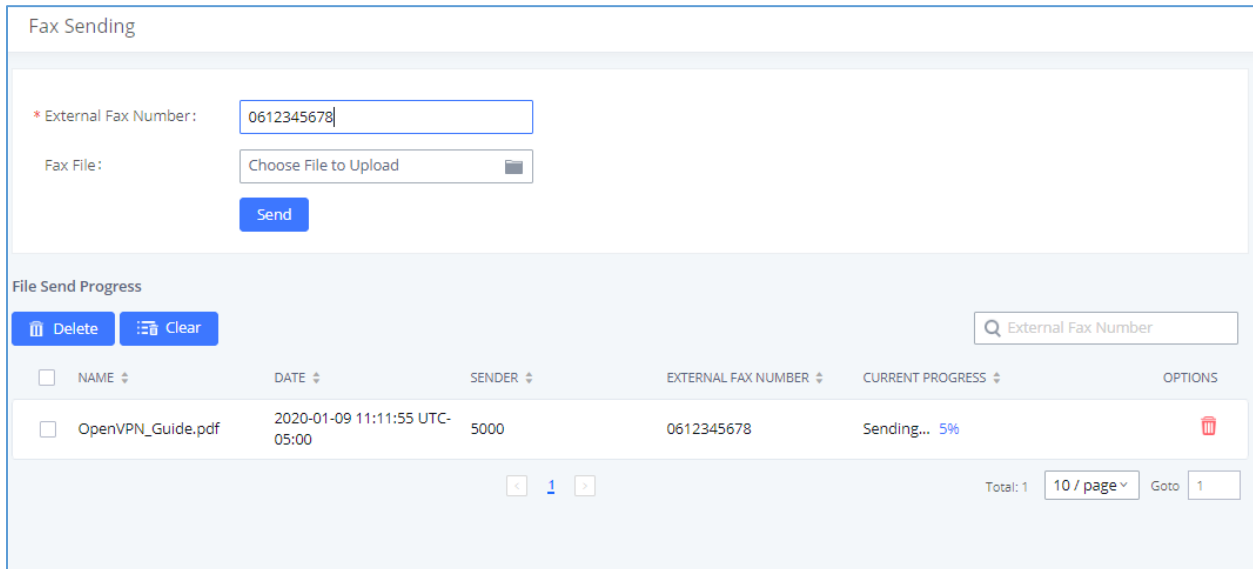
- Fax Sending.
- Call Queue.
- Wakeup Service.
- CRM User Settings.

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.



Fax Sending

* External Fax Number:

Fax File:

File Send Progress

<input type="checkbox"/>	NAME ↕	DATE ↕	SENDER ↕	EXTERNAL FAX NUMBER ↕	CURRENT PROGRESS ↕	OPTIONS
<input type="checkbox"/>	OpenVPN_Guide.pdf	2020-01-09 11:11:55 UTC-05:00	5000	0612345678	Sending... 5%	<input type="button" value="Delete"/>

Total: 1

Figure 18: Value-added Features → Fax Sending

Notes:

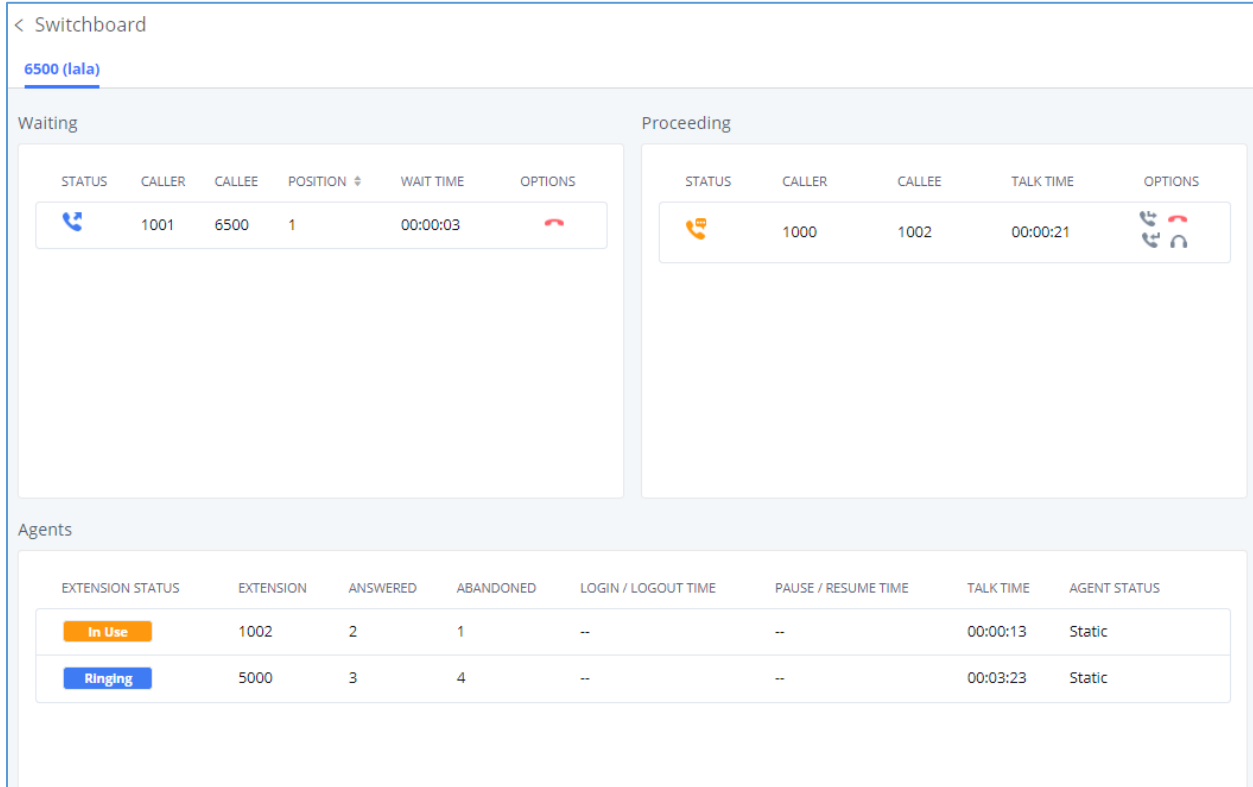
- Only PDF or TIF/TIFF files are accepted.
- The “File Send Progress” field shows all the information about the faxes that have been sent and gives to the user an idea about the percentage of the fax current progress.



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.



The screenshot shows a 'Switchboard' interface for user '6500 (lala)'. It is divided into three main sections: 'Waiting', 'Proceeding', and 'Agents'.


Waiting Section: A table with columns: STATUS, CALLER, CALLEE, POSITION, WAIT TIME, and OPTIONS. It shows one call from caller 1001 to callee 6500, with a wait time of 00:00:03 and a hang-up icon.

Proceeding Section: A table with columns: STATUS, CALLER, CALLEE, TALK TIME, and OPTIONS. It shows one established call from caller 1000 to callee 1002, with a talk time of 00:00:21 and icons for hang-up and transfer.

Agents Section: A table with columns: EXTENSION STATUS, EXTENSION, ANSWERED, ABANDONED, LOGIN / LOGOUT TIME, PAUSE / RESUME TIME, TALK TIME, and AGENT STATUS. It shows two agents: extension 1002 (In Use) and extension 5000 (Ringing).

EXTENSION STATUS	EXTENSION	ANSWERED	ABANDONED	LOGIN / LOGOUT TIME	PAUSE / RESUME TIME	TALK TIME	AGENT STATUS
In Use	1002	2	1	--	--	00:00:13	Static
Ringing	5000	3	4	--	--	00:03:23	Static

Figure 19: Value-added Features → Call Queue

Waiting	This menu shows the current waiting calls along with the caller id and the option to hang-up call by pressing on the  button.
Proceeding	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.
Agents	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 **+ Add** 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

Enable Wakeup Service:

* Name:

Prompt:

Custom Date:

* Date:

* Time:

Figure 20: Value-added Features → Wakeup Service

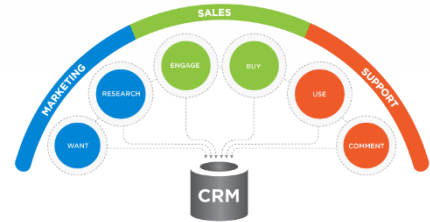
Table 1: Wakeup Service Parameters

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



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 21: 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.