

# End User Portal Training

# What we will cover

- Dashboard
- Messages
- Devices
- Numbers
- Call logs
- My settings

crexendo® Ross Barkley Available Options

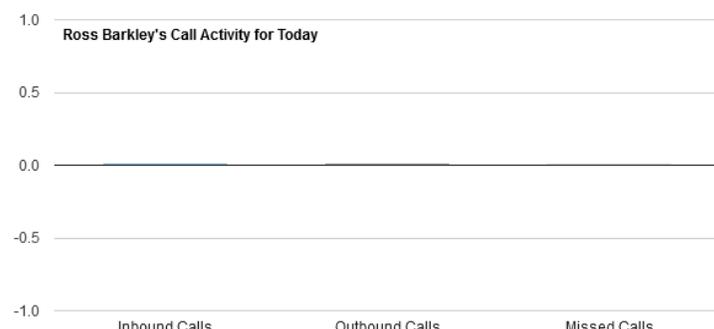
MESSAGES EXTENSIONS NUMBERS DEVICES CALL LOGS MY SETTINGS

Phone Rules Fax Rules Logout Help

**Today**

This section shows you how many of each type of call you have. If there were calls listed, bars will appear on the chart below.

### Ross Barkley's Call Activity for Today



Call Type	Count
Inbound Calls	0
Outbound Calls	0
Missed Calls	0

Data as of: 10/12/2018, 3:29:51 PM

**Alerts**

This will take you to the messages folder

Unread Voicemails

0

These are your new voicemails that have not been listened to

[Show Details](#)

Data as of: 10/12/2018, 3:29:51 PM

### Get a \$100 Gift Card!



Receive a \$100 gift card for referring us to a potential new client!

Call us at (480) 426-9807 or email your referral to [referrals@crexendo.com](mailto:referrals@crexendo.com). Once your referral places an order\* with us you will receive a \$100 gift card from Crexendo!

\*Minimum 12 month term for new orders to be eligible for the gift card.

### Video Conferencing!

Are you doing video conferencing with your customers and employees?

Do you know you can do this from your Crexendo phone system and save money too?

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# Messages



The screenshot shows a webmail interface with a list of messages. The interface includes a 'Forward' button, an 'Actions' dropdown, and buttons for 'Junk', 'Delete', and 'Download'. A search bar is also present. The message list has columns for 'From', 'Subject', 'Date', 'Size', and 'Junk'. Two messages are shown, both with call icons and the subject 'Voice Mail for Ross Barkley'. Annotations with red arrows point to specific elements: 'Regular font means the message has been listened to' points to the subject of the first message; 'The number corresponds to how many new messages you have.' points to the number '1' in the 'Inbox (1)' folder; 'Bolded means the message has not been listened to' points to the bolded '4004' in the 'From' field of the first message; and 'This field shows a time if the message came in on the current day, or a date if it came in on a previous day' points to the '4:02 PM' in the 'Date' field of the second message.

From	Subject	Date	Size	Junk
4004	Voice Mail for Ross Barkley	4:39 PM	218 KB	0%
<b>(855) 211-2255</b>	Voice Mail for Ross Barkley	4:02 PM	306 KB	0%

**Folders:** Inbox, Drafts, Junk, Sent, Trash are all default folders and come standard with each account. An account admin can create additional folders if they are needed.

**From:** This will show you the phone number that the message came from. If it is an outside caller, it will show the full 10 digits. If it is an internal caller, it will just show an extension.

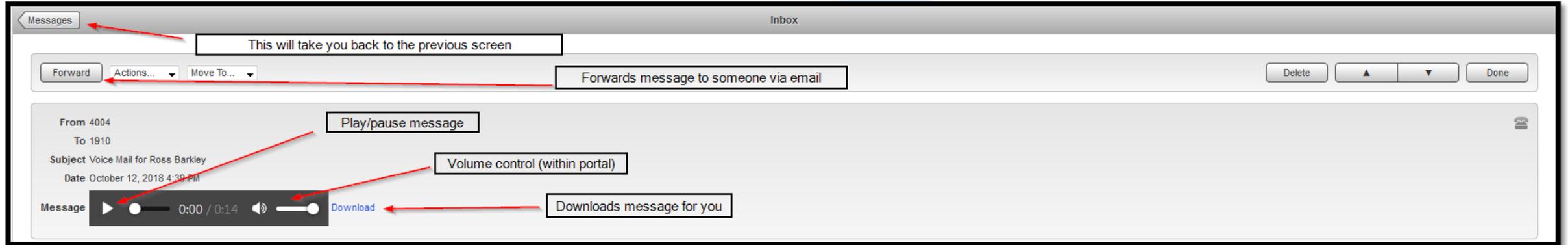
**Subject:** This is standardized across the board, voicemail will always appear as “Voice Mail for [insert extension name]”. If it is a fax or a call recording (2 other types of messages that can appear here), it will specify that as well.

**Date:** The time or date that the message came in. If it is from the current day, you will see a time. If it is from a previous date it will either say what day it was if it was within 7 days (such as Monday), or it will list a date like MM/DD/YYYY.

**Size:** How much space in your storage quota the message is using.

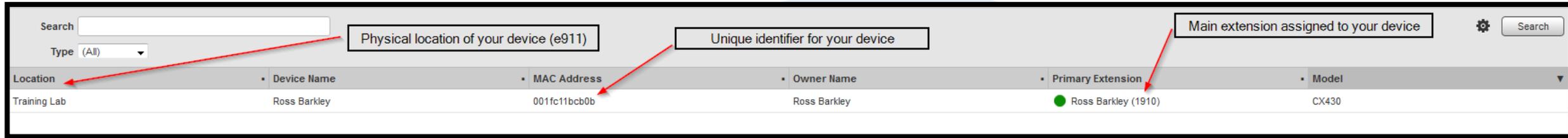
**Content:** This is a search bar.

# Inside a Message



- **From:** Who called you.
- **To:** Your extension or direct line.
- **Subject:** Will tell you who the voicemail is for.
- **Date:** Time and date voicemail came in.
- **Message:** This allows you to play the message on the portal. You can use the knob next to the play button to adjust the starting position of the message. You can also adjust the volume (alters volume when listening in the portal only). You can also download the message onto your computer by pressing the Download button.

# Devices



Location	Device Name	MAC Address	Owner Name	Primary Extension	Model
Training Lab	Ross Barkley	001fc11bcb0b	Ross Barkley	<span style="color: green;">●</span> Ross Barkley (1910)	CX430

- **Location:** The physical location of your device, this is how e911 is setup. This should always be accurate and updated if the device moves to a new location.
- **Device Name:** Name of the device.
- **MAC Address:** Each phone has a unique MAC address, no two are the same. The last 4 digits are always different, whereas the first set are always the same (differs depending on phone model).
- **Owner Name:** User who owns the device.
- **Primary Extension:** The main extension assigned to this phone.
- **Model:** What type of phone is it.

Now, what does the green dot mean?

# Registration

Primary Extension	Model
● Ross Barkley (1910)	CX430

Primary Extension	Model
● Ross Barkley (1910)	CX430

## What is Registration?

Registration is the process of your phone reaching out and opening a line of communication with our servers. If your phone is registered, it means you can place and receive calls. If it is not registered, you will be unable to place or receive calls (even if you have a dial tone).

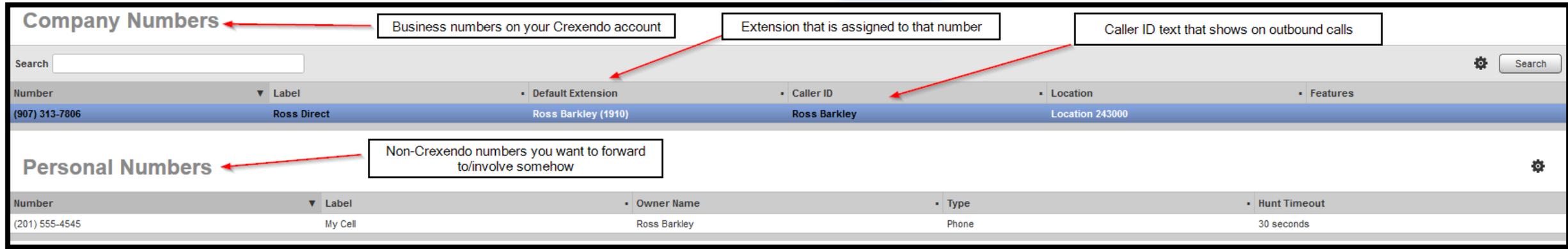
## What do the Green and Red Dots Mean?

A green dot means that your phone is registered, whereas a red dot means your phone is not registered.

## What if I Have a Red Dot Next to My Phone? What Do I Do?

First thing to do is to make sure all of your cables (power, Ethernet) are all plugged in snugly. Once that is done, remove the power cord and wait 10 seconds, then plug it back in. The phone should re-register when it finishes booting up. If you still have problems after that, contact your IT department (or whoever handles the phones).

# Numbers



Company Numbers					
Number	Label	Default Extension	Caller ID	Location	Features
(907) 313-7806	Ross Direct	Ross Barkley (1910)	Ross Barkley	Location 243000	

Personal Numbers				
Number	Label	Owner Name	Type	Hunt Timeout
(201) 555-4545	My Cell	Ross Barkley	Phone	30 seconds

**Company Numbers:** Any business number that is on your Crexendo system.

**Label:** Internal (non-customer facing) use only, allows you to label each number.

**Default Extension:** The extension that rings first when you call that number.

**Caller ID:** The text that shows when you call out and show that number (i.e. 907-313-7806 will show “Ross Barkley” when calling outbound).

**Location:** Optional, allows you to tie a number to a location.

**Features:** If anything is setup, such as e911 or SMS, on the number it will be listed in this column.

**Personal Numbers:** Any non-Crexendo number you want to use within your system, such as a cell phone.

**Type:** What “type” of phone/number is it. This is not important unless you use SMS notifications, so we generally recommend using the “phone” type.

**Hunt Timeout:** How long that number will ring if it is used within a ring group.

# Personal Numbers

Number	Label	Owner Name	Type	Hunt Timeout	
(201) 555-4545	My Cell	Ross Barkley	Phone	30 seconds	<div style="text-align: right;"><span>Click "Add"</span></div> <div style="text-align: right;"><span>+ Add</span> <span>Edit</span> <span>Delete</span></div>

**Step 1:** Click on the gear cog, then select “Add.”

**Personal Number**

Number:

Label:

Owner:

Kind:

Hunt Timeout:

**Step 2:** Fill in the number on the number field.

**Step 3:** Give it a label (makes it easier for your admins, as well as Crexendo support staff).

**Owner:** Leave with yourself, or choose another user within your system if desired.

**Kind:** Home, Cell (forces you to choose a mobile carrier), Office, Phone. We generally use the phone type, cell is only needed if you are setting up SMS notifications.

**Hunt Timeout:** How long this number will ring if included in a ring group or a status.

# Call Logs

**Call Logs** ⚙️

Search  ⚙️ Search

**Date Range** 1 Jan 2000  1 Jan 2000

Type  Inbound  Outbound  Missed

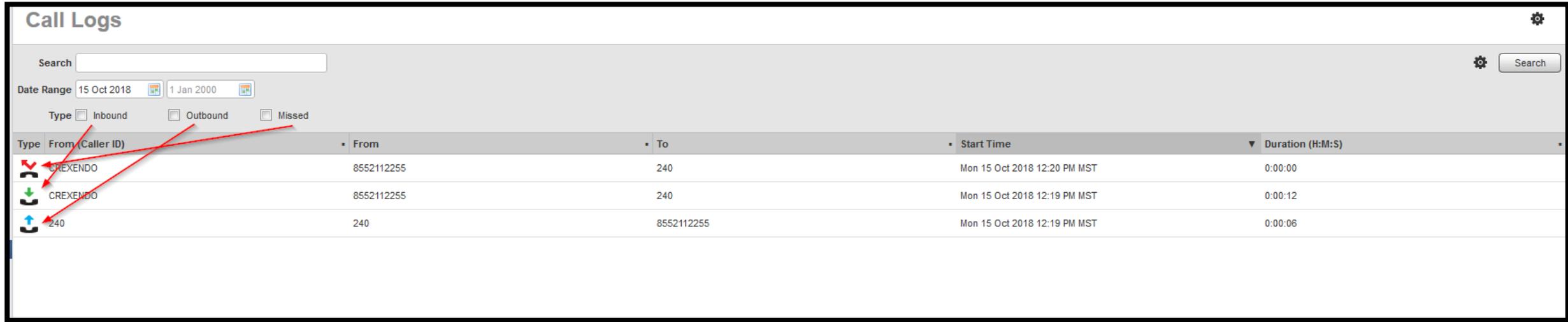
**Search by number, extension, or caller ID**

**Start date in the date range** **End date in date range**

Type	From (Caller ID)	From	To	Start Time	Duration (H:M:S)
No records found					

Allows you to download your call logs in an Excel Spreadsheet

[Download](#)



Type	From (Caller ID)	From	To	Start Time	Duration (H:M:S)
CREXENDO	8552112255	240		Mon 15 Oct 2018 12:20 PM MST	0:00:00
CREXENDO	8552112255	240		Mon 15 Oct 2018 12:19 PM MST	0:00:12
240	240	8552112255		Mon 15 Oct 2018 12:19 PM MST	0:00:06

**Type:** Signifies what kind of call (inbound, outbound, missed).

**From (Caller ID):** The caller ID we were able to pull from the call if it was inbound or missed. It will show your extension if you made the call.

**From:** This is the caller. It will show the person who initiated the call. If you initiated the call, it will show your extension here.

**To:** This is the person receiving the call. Your extension will be listed if it is inbound or missed, the number you dialed will be displayed if it was an outbound call.

**Start Time:** The date and time the call was initiated.

**Duration:** The length of the call.

\*\*\*You will see missed calls with durations. Our system determines the status of a call based on the place it last rang to and whether or not the call was answered there.\*\*\*

# My Settings

Back
Ross Barkley - Settings

Name

**Voicemail Options**

PIN

Forward Other Email

Delete after forward

Voicemail Transcription Disabled

Operator None

Prompts	Name	Voicemail Prompt	Active Prompt
1	<input type="text" value="In Office"/>	 <a href="#">Download</a>	<input checked="" type="radio"/>
2	<input type="text" value="Out of Office"/>	 <a href="#">Download</a>	<input type="radio"/>
3	<input type="text" value="Holiday"/>	 <a href="#">Download</a>	<input type="radio"/>

**Fax Options**

Outbound Cloud Fax From Email Address  Access Code  Outbound Caller ID

**PIN:** This is your voicemail PIN.

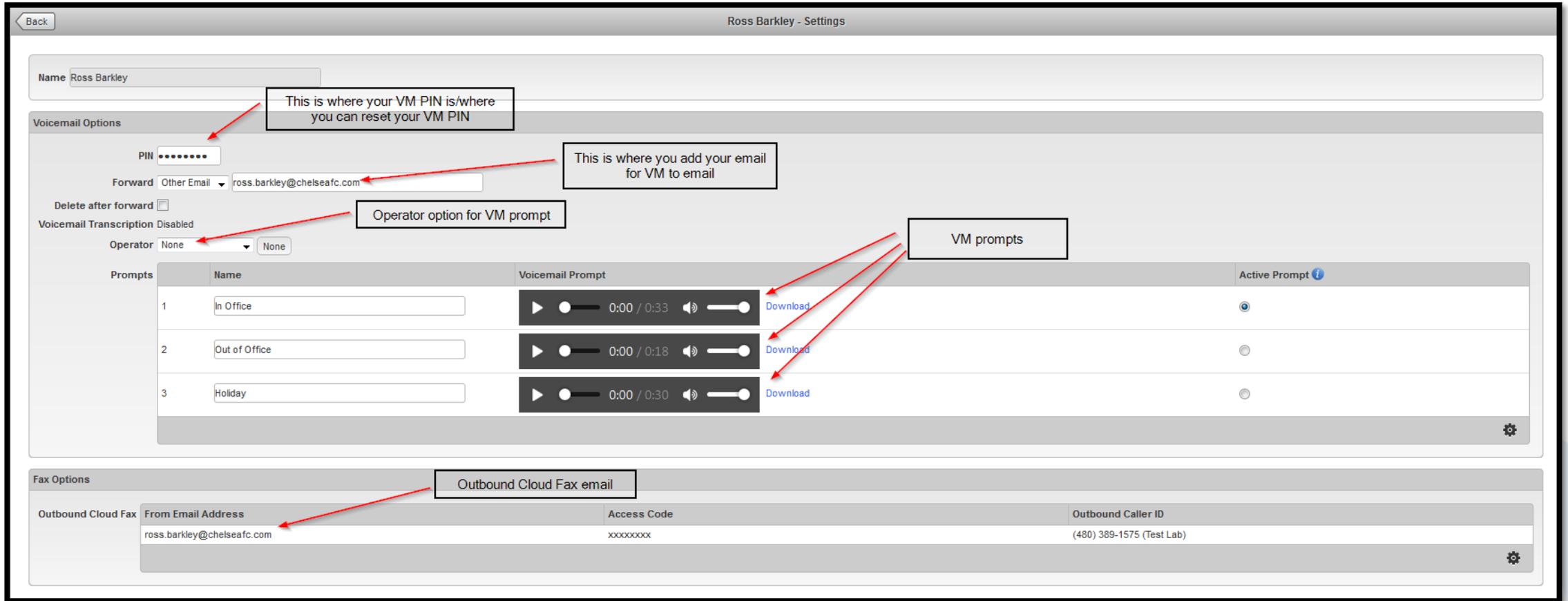
**Forward (Other Email):** This is the email used for VM to email.

**Delete After Forward:** Deletes voicemails from your phone after the system emails them out to you.

**Voicemail Transcription:** Transcribes (best effort) your voicemail messages and sends you a script of what they said.

**Operator:** Allows you to give callers another option to reach someone (i.e. “Press o now to be re-routed to the receptionist for further assistance”).

# My Settings



Back Ross Barkley - Settings

Name Ross Barkley

Voicemail Options

PIN .....

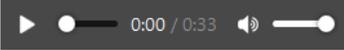
Forward Other Email ross.barkley@chelseafc.com

Delete after forward

Voicemail Transcription Disabled

Operator None

Prompts

Prompts	Name	Voicemail Prompt	Active Prompt
1	In Office	 0:00 / 0:33  Download	<input checked="" type="radio"/>
2	Out of Office	 0:00 / 0:18  Download	<input type="radio"/>
3	Holiday	 0:00 / 0:30  Download	<input type="radio"/>

Fax Options

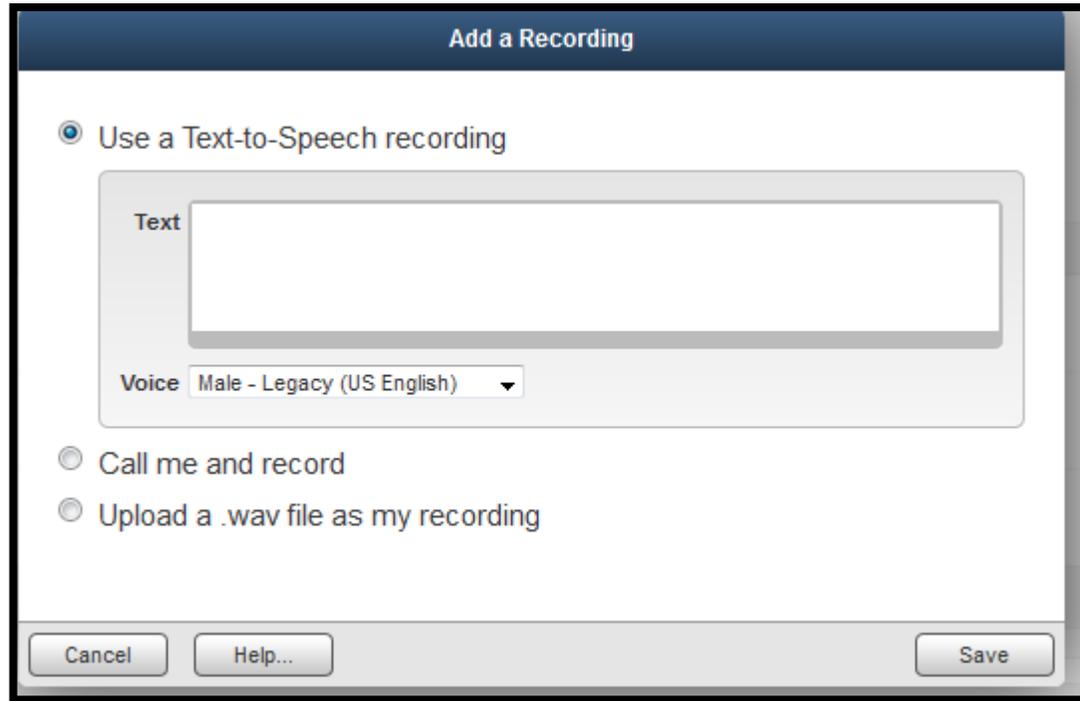
Outbound Cloud Fax

From Email Address	Access Code	Outbound Caller ID
ross.barkley@chelseafc.com	xxxxxxxx	(480) 389-1575 (Test Lab)

**Prompts:** These are your voicemail prompts, you can store up to 9 at a time and label them as well.

**Outbound Cloud Fax:** If you use our cloud faxing service, this is the email address associated with your outbound cloud fax access.

# Adding a Prompt



The screenshot shows the 'Add a Recording' dialog box. The 'Use a Text-to-Speech recording' radio button is selected. Below it is a text input field labeled 'Text' and a voice selection dropdown menu currently set to 'Male - Legacy (US English)'. At the bottom, there are 'Cancel', 'Help...', and 'Save' buttons.



The screenshot shows the 'Add a Recording' dialog box. The 'Call me and record' radio button is selected. Below it is a 'Number' input field and a 'Call Me' button. At the bottom, there are 'Cancel', 'Help...', and 'Save' buttons.

**Text-to-Speech:** The system will generate a prompt for you based on what you enter in the text box, and the voice you select.

**Call me and record:** The system will call you at the number listed, and will lead you through a series of prompts to record your voicemail message.

**Upload a .wav file as my recording:** This requires you to have the prompt you want to use as an audio file saved on your desktop.

Have Questions or Need Assistance?  
Contact our Support Team!

855-211-2255  
Support@Crexendo.com