Bootcamp 1 – Personalise and Customise

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The first in a series of four bootcamps to help you fully leverage your SIPcity Cloud PBX.

With SIPcity you can manage your VoIP calling and features from within one simple software application. From managing your inbound and outbound calls, to setting up voicemail to email, call recordings, and more. To help you get the most out of SIPcity we've created four Bootcamps:

1. Personalise and Customise

2. Manage your Inbound calls

3. Manage your Outbound calls

4. Understand Advanced Features

The first bootcamp will show you how to personalise your SIPcity Cloud PBX settings.

Update Personal Account Details

Keeping your account's personal account details current will make sure that you keep on top of all aspects of YourCloudPBX from accounts to settings.

1. Log into SIPcity

2. Select Account > Personal details

3. Fill in or update your details. Within this section you have the option to; fill in contact details, and billing details, select billing email options and reset your account password.

4. Click Update details to update.

Check Account Credit Settings

By now you have entered your credit card details into your account. It is important to understand how and when payments will be deducted from your credit card.

There are two separate processes that trigger credit card payments and we will explain how these work.

1. Automatic account credit top-up

2. Payment of your fixed monthly account charges

Top Up Settings

If you are on a pay-as-you-go calling plan, each call you make and each service you purchase will be deducted from your account balance. So, if your account balance is $10.00, every time you make a call this is deducted. Once you reach your specified threshold, your account can be automatically topped-up with a payment made via your saved credit card.

If you do not have your account set to automatically top-up you risk losing the ability to make outbound calls. This includes any calls that you may have forwarded to mobile numbers as these are outbound calls.

If you are on a pre-paid calling bundle, this may not include international calls and/or calls to 13/1300 numbers. So you will need to have credit on your account to make these calls. Setting an auto top-up will ensure your credit is added to your account if you go over the calling allowance in your bundle.

We recommend setting this to ON.

Add Numbers and Channels

Numbers

You can add numbers to your account at any time. Once added to your account, you can then customise the settings for this number and also add a device such as a handset or a softphone.

- Select Account from the top menu, you will see an additional navigation menu on the left.

- From the left menu, select Manage numbers.

- In the bottom section on the Manage numbers screen, you will see where you can Add numbers.

- Choose the State and Region along with the Line type which is either Voice or Fax.

Numbers and channels are charged as per the plan or bundle you have chosen.

Channels

Your account has channels allocated to it when it is activated. The number of channels allocated is determined by the Plan you choose.

Each call requires one channel. So if you have for example five numbers but you may only ever have two calls, you can get by with just two channels. However, if you have five numbers and you want to have two calls and say two calls on hold, then you will need four channels.

So, for channels, you will need to consider how many numbers you want to have and how many simultaneous calls you will have connected at once.

- One call = one channel

- One call + one call on hold = two channels

For information on how to add more channels, contact your provider.

Add number

Country	Australia ⌄
State	NSW ⌄
Locality	Newcastle ⌄
Server type	Voice ⌄
Plan	NZ Local Number ⌄
Cost	8.00
Pro-rata charge	2.32

ADD   CANCEL

Numbers and channels are charged as per the plan or bundle you have chosen.

Connect Handsets and Soft Phones

Handsets and Soft Phones are commonly referred to as "devices". Within this Cloud PBX system, there are a few fundamental rules regarding devices:

- You can only have one device per number. Although with our feature Shared Line, you can use your number on multiple devices.

- Any physical device (handset) must be IP telephony capable.

- The device connects to a VoIP domain (proxy) which sends and receives your calls. This address should be on your Welcome Email, if not, your service provider will advise you of this domain address.

- Connecting your device is referred to as "provisioning".

- Auto device provisioning is supported for Yealink and Polycom. Config files for other IP devices may be available from your service provider.

Connecting a VoIP Handset

This is how you connect your physical device to a number account. Note that this is only for Yealink and Polycom phones.

- From the Cloud PBX menu at the top of your screen, click the green Add device button.

- From the Select device drop-down, select your handset type.

- Add the MAC address.

- Select the number to be connected to the device.

- Enter a Label. This is an internal name only and will appear on the handset, not the outbound caller display

- Save the information.

- Connect or restart your handset and the settings will be uploaded and you can now make and receive calls.

Connecting to a SoftPhone

You can make and receive calls through a softphone installed on your mobile device, desktop PC, or Mac. This is so handy for anyone who travels so they can make calls from their mobile using a local phone number. And also for teams who make lots of calls and they can have a device set up on their computer.

- You will need to install the appropriate app onto your device

- If you are using a softphone app given to you by your service provider, it is likely the domain proxy details will already be configured. If not, you will need to enter this.

- Enter the username which is your phone number, along with your password.

- You will see the phone saying "registered" and you will then be able to make and receive calls.

Device Provisioning in your Cloud PBX account is not used to set up Soft Phones.

Personalise Numbers

Now that you have numbers set up on your account, there is so much more you can do to customise these numbers. This includes:

- Setting the Caller ID so that when outbound calls display your name or number.

- Add your voicemail messages.

- Set up your voicemail so your messages are automatically sent to an email address.

- Set up Call Recording so a .wav file for each in/outbound call is saved.

To enable functionality for each number, follow these steps:

1. From the main menu, click Cloud PBX and you will see your phone numbers listed.

2. Click on the number you want to update the settings for. When you do this, you will see Messages on the top left menu, and unless you have any voicemail messages left for you this page may be blank.

3. Click into the menu items on the left, such as Inbound Calls, and you update the settings for your number.

There is so much more functionality that you can use to personalise your numbers. We recommend you take the time to see all the articles in Manage Your account and pick out those which you would like to use.
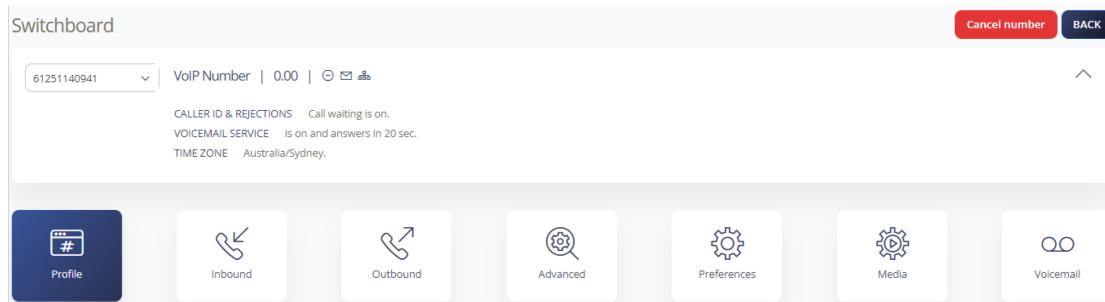
Restrict Numbers

Okay, this might be a little tricky to get your head around, so take a moment to think this through. Here are some basic steps.

- You have set a user name and password for your account.

- You are the administrator of your account and you use the above credentials to access your account.

- When you assign a phone number to a person, you can give them access to the Cloud PBX via their own user name and password, so they can now set up and manage the features. This is referred to as a Restricted Number.

- Restricted numbers should be assigned unique passwords, up to eight characters.

Don't use wildcard characters like #$*!& in the password.

- Etiquetas
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