

OneCloud Portal

Basic User Guide



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Endless Solutions.

OneCloud Portal Basics

Welcome to the OneCloud Basics user guide. This document has been developed to assist users with finding the answer to some of the basic understandings, as well as a few advanced functions OneCloud has to offer. With the help of this guide, users will be able to navigate and take advantage of the mobile amenities that OneCloud has to offer with confidence. Let's get started.

Accessing the Portal

You will first need to complete setting up your account using the **Welcome Email** sent to you by either the onsite installer or TelWare support team. Once set up, you can access your account by navigating to **Myonecloud.com**.

Home

The **Home** screen provides an overview of new voicemails, recent history, current active answering rules, and lists phones and apps currently bound to your profile. From the home screen, you are also able to quickly navigate between other features of your phone system.

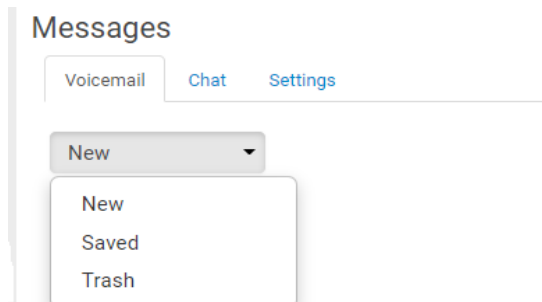
- **APPS** | Click the Apps drop-down to access OneCloud apps such as the Attendant Console, HDMeet, and more. We'll cover the apps in detail later in this guide.
- **PROFILE** | Click on your name in the top right corner to edit your Profile.
- **NEW VOICEMAIL MESSAGES** | The New Voicemail Messages panel displays all new voicemails. The voicemails are displayed with the number of the caller that left a voicemail. Their caller ID name. Followed by the date and time the message was left and the duration of the voicemail. You will also see the options to Call to Play, forward the voicemail, download the voicemail locally to your computer or delete the voicemail message.
- **ACTIVE ANSWERING RULES** | To the right, you will see the Active Answering Rule window which will display which rule is currently active and provide a summary of how calls are routed when they reach your extension. You can select a different answering rule by clicking the Active Answering Rule drop-down and selecting a different rule.
- **RECENT CALL HISTORY** | The Recent Call History panel provides an overview of the last 10 calls. A phone with a red icon means a call was not answered. Phone icon with a blue arrow means an inbound call was answered. 5 blue circles mean that a call was placed to a conference bridge.
- **ACTIVE PHONES** | The Active Phone fields below list the active phones currently registered to your account you can send and receive calls from. If you do not see a device listed there that should be, that means the device is not configured for your account or the device is currently unregistered.

Messages



You may access the messages page by clicking on the **Messages** navigation button at the top of your screen. If you have a new voicemail, the **Messages** button will display a notification.

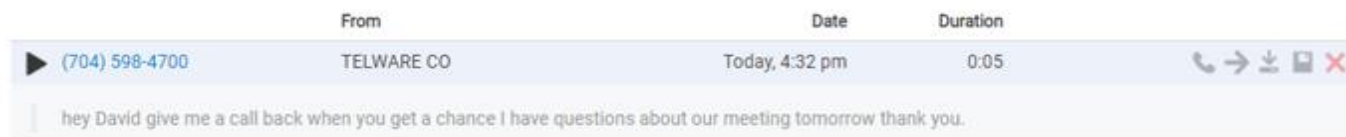
On the **Messages** page, you may view your voicemail messages, chats, SMS (if enabled for your number), and settings.









From the **Voicemail tab**, you can view your current voicemails. Using the drop-down menu, you can view New, and Saved voicemail messages, as well as voicemails that have been sent to the trash. Keep in mind, The trash is emptied daily, and the voicemails are not recoverable.
**Consider using voicemail to email covered later in this guide.*

Voicemail Options

While viewing an active voicemail, you can quickly view details such as caller ID, time and date of the message, and voicemail duration. You are also able to perform the additional options listed below from the **Voicemail tab** while viewing an active voicemail.



-  **PLAY**
The phone system will call your extension and play the voicemail.
-  **CALL TO PLAY**
The phone system will call your extension and play the voicemail.
-  **FORWARD**
Forwards the selected voicemail to another extension.
-  **DOWNLOAD**
Downloads selected message to your computer.
-  **SAVE**
Moves selected voicemail to saved mailbox.
-  **DELETE**
Moves selected voicemail to your trash. Trash is emptied nightly.

Chat and SMS

When selecting the Chat tab, you can view your internal chat and SMS messages.

Messages

The screenshot shows a user interface for managing messages. At the top, there are three tabs: 'Voicemail', 'Chat and SMS' (which is active and has a red notification badge with the number '2'), and 'Settings'. In the top right corner, there is a 'New Conversation' button with a pencil icon. Below the tabs, there is a list of messages. The first message is from '1801' with the text 'Good afternoon, Do you have a moment to discuss the current budget for the City project?' and is timestamped 'Today, 4:49 pm'. The second message is from 'Brandon Brown' with the text 'Hello Ben! Would you be available in 15min for a quick impromptu meeting?' and is timestamped 'Today, 4:48 pm'. Each message has a reply icon (curved arrow) and a delete icon (red X) to its right.

Start a New Conversation

To start a new conversation, click the **New Conversation** button as seen in the right-hand corner and a new chat window will appear. Start typing the user's name or press down to see a list of everyone in the organization you can select from. Or on your contacts widget click the chat box icon next to their name. After clicking one of the options a chat window will appear. Click in the **Send a message...** field and start typing. Press enter when you would like to send your message.

Replying to message

If you would like to reply to a message, simply type in the chat window that displays when receiving a message. You can also click the reply icon to the right of the message in the message center.

Delete a message

To delete a message, click the red x that appears next to the reply button when hovering over the message.

Settings

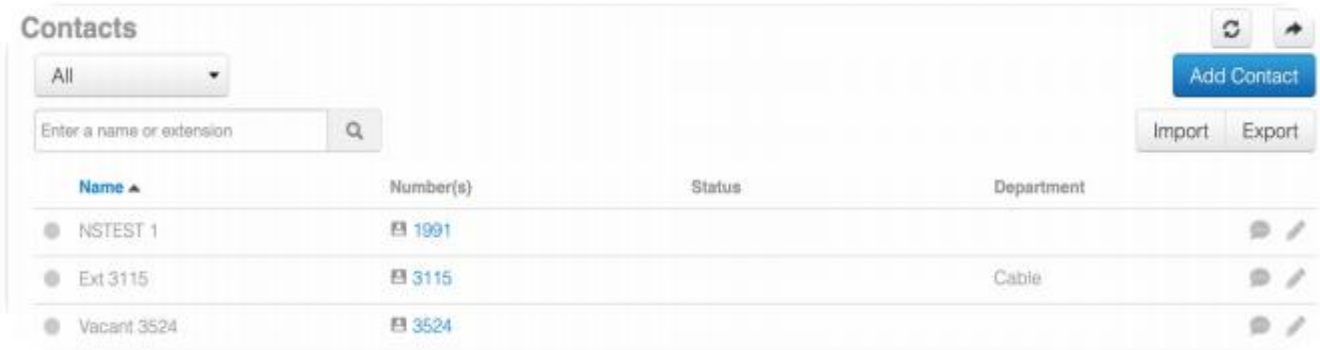
When selecting the **Settings** tab, you are able to customize your voicemail settings. You may enable/disable your voicemail box, adjust how messages are presented to you, manage voicemail greetings, update your recorded name, and specify the desired **voicemail to email notifications**.

- **ENABLE VOICEMAIL** | Click the Apps You can enable or disable the voicemail by clicking the checkbox next to Enable Voicemail option. A check means voicemail is enabled and unchecked means that it has been disabled.
- **INBOX** | Clicking the box next to **Sort voicemail inbox by latest first** will configure your voicemail to play the most recent voicemail message left as the first message you hear. If this option is not enabled the voicemails will be played in the order they were received. Clicking the box next to **Announce voicemail received time** configures your voicemail account to tell you the time the voicemail was left when checking messages. Clicking the box next to **Announce Incoming Call ID** will have your voicemail read the caller ID number to you.
- **GREETINGS** | Under the voicemail inbox options, you will see the **Greetings** section contains your voicemail greeting and recorded name used in the company directory. You can have more than 1 voicemail greeting and the drop-down box allows you to select which greeting callers will hear when reaching your voicemail. To the right of the message select option, you will see 3 icons for the options to Play the voicemail greeting, Download the greeting, Or Manage Greetings.
- **UNIFIED MESSAGING** | The **Email Notification** option allows you to select the format of voicemail email notifications that you receive.

Contacts

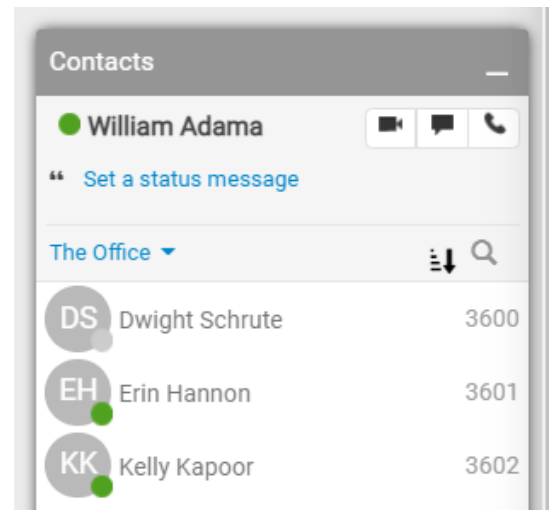


Under the **Contacts** navigation button, you will find your system directory as well as any personal contacts you add. Here you may create new contacts for your extension, import/export contacts from/to other email accounts, and call contacts from your preferred device via the web browser.



You may also view your contacts by expanding the **Contacts** tab at the bottom right-hand side of the portal's home page. Hovering over a contact will allow you to interact with that contact.

Pressing the video button will initiate a video conference where you may share your desktop to collaborate in addition to voice, video, or text communication. Pressing the chat icon will open an instant message chat window that will permit you to Instant message your coworkers, call your coworkers or initiate a video conference. Pressing the phone icon will initiate a call. When using this method, you can choose the registered device of your choice (softphone or desk phone).



Answering Rules



!!! IMPORTANT: Most Users do not change Answering Rules or Time Frames. These are considered advanced features.

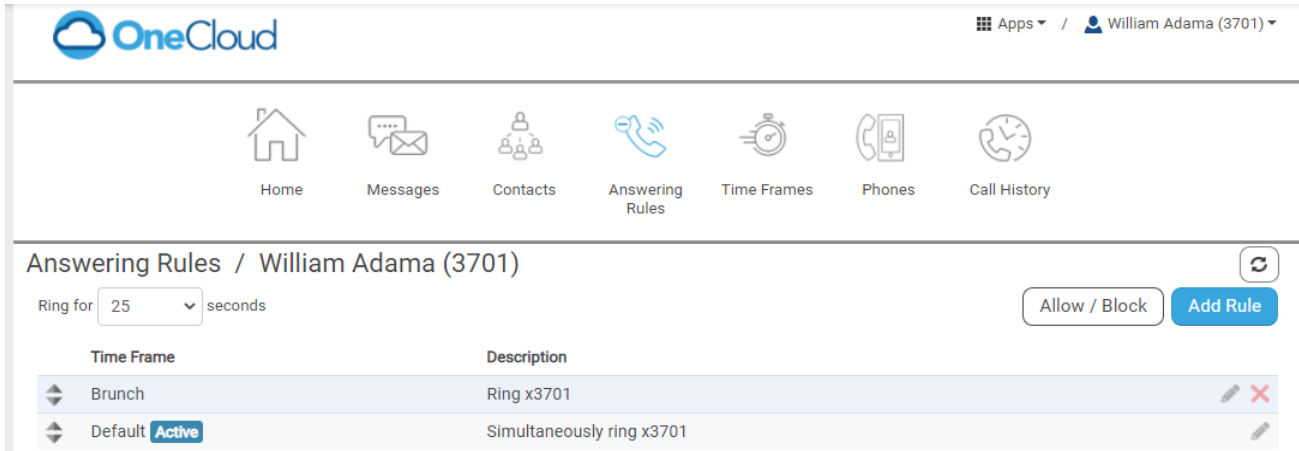
On the **Answering Rules** page, you may easily adjust how calls flow to your extension with pre-built settings. In the top left-hand corner, you can set your default ring timer before calls are sent to your voicemail.

By clicking the Allow / Block button, you can enter 10-digit phone numbers to block. To create a new answering rule, click the Add Rule button in the top right. At the top of the new window, you will set your custom Time Frame as well as whether your phone will be in Do Not Disturb or playback the Caller ID for the number calling you before your call is connected.

You may also control Call Forwarding. **"Always"** will continuously send your calls to another extension or phone number. **"When busy"** will ring your phone and if you are on a call or in do not disturb and will send the call to another extension or phone number. If **"When Unanswered"** is enabled, the call will be sent to another extension or phone number before the call is sent to voicemail. When your extension is offline (option: "when offline"), the call will be sent to another extension or phone number.

Time Frames

By clicking **Time Frames** in the navigation bar, you can create a new Time Frame as well as view existing time frames. To create a new time frame, click Add Time Frame. You will then be presented with 3 options of Always, Days of the week and times, and Specific Dates or ranges. Time frames can be used to adjust your answering rules.






OneCloud Apps / William Adama (3701)

Home Messages Contacts Answering Rules Time Frames Phones Call History


Answering Rules / William Adama (3701) Refresh

Ring for seconds Allow / Block Add Rule

Time Frame	Description	
Brunch	Ring x3701	 
Default Active	Simultaneously ring x3701	

Phones

The **Phones** menu will display registered devices for your extension (mobile app, desk phone, & web phone.)

You can edit the buttons displayed on your phone's screen, however, some of the buttons have been preprogrammed and cannot be changed. Buttons that cannot be edited will display a lock to the right of the button. 

To edit your phone's buttons, select the gear next to the device you wish to edit and press "Yes" on the confirmation pop-up. You can now edit the buttons on your phone using the ellipsis button. In the top right you will see a directory where you may edit how contacts are displayed. TelWare has preprogrammed some of these buttons and cannot be changed.



OneCloud

Reset  



- 1 Line Appearance  3137 (Ben Smagacz)   
- 2 Call Park  Park 1   
- 3 Call Park  Park 2   
- 4 Call Park  Park 3   
- 5 Speed Dial  My Cell   
- 6 Tier 1    
- 7 Unassigned   
- 8 Unassigned   

Button Options Include









- **USER (BLF)** | Click the Apps You can enable or disable the voicemail by clicking the checkbox next to Enable Voicemail option. A check means voicemail is enabled and unchecked means that it has been disabled.
- **CALL PARK** | Parks a call to the entered value. Pressing again will retrieve that call from the Call Park.
- **SPEED DIAL** | Calls the entered phone number.
- **DTMF** | Dials a string of numbers, * and/or #.
- **QUEUE TOGGLE** | Log using in/out of the queue. All queues will be toggled.
- **TIME FRAME TOGGLE** | Activate/Deactivate a specific time frame.

Call History


By clicking the Call History navigation button, you may view all incoming/outgoing/missed calls to your extension.


Call History			
Filters 07/27/2021 12:00 AM – 07/30/2021 11:59 PM			
Number	Name	Date	Duration
 (704) 867-5309		Today, 3:45 pm	0:02
 (828) 610-5896		Today, 2:36 pm	6:21

You are presented with two additional options for Filtering and Exporting the call logs of your extension. By selecting Filters, you may choose either a range of dates or a specific date you would like to gather data from. To further analyze your calls, you may input a Dialed Number, or the number of an external caller dialed to reach you. If you do not know what was dialed, you may choose to search your call records by selecting a call type of Inbound, Outbound, or Missed.

Call History	
Filters 08/01/2021 12:00 AM – 08/04/2021 11:59 PM	
Number	Name
 8002	
 (980) 495-2798	Agent Two
 8002	
 (980) 495-2798	Agent Two
 8002	
 (980) 495-2798	Agent Two
 8002	
 8002	

Call History Filters

From 

To 

Caller Number

Dialed Number

Call Type

[Clear Filters](#)

Apps

Although this guide will not go into detail on each app, here are brief descriptions of the Apps you may see displayed in your OneCloud Portal.

- **ATTENDANT CONSOLE** | A powerful web UI connecting to your desktop phone that allows drag-and-drop call management. Typically used by a receptionist.
- **WEBPHONE** | A softphone that allows you to make and receive calls using your PC or Mac.
- **SECURE FAX** | Add-on feature allowing you to send & receive faxes in a HIPAA compliant manner.
- **E911 PORTAL** | Remain compliant with Kari's Law and Ray Baum's Act with this easy-to-use E911 Portal.
- **HDMEET** | A video meeting solution included with your OneCloud subscription.
- **ENHANCED REPORTING** | Add-on feature for cradle-to-grave advanced reporting.

Attendant Console

OPENING THE ATTENDANT CONSOLE

To open the attendant console, press the **Apps** dropdown in the top right of the OneCloud portal. Then select **Attendant Console**.

ACTIVE CALLS

Active calls are displayed on the right-hand side of the screen.

TRANSFERRING CALLS

With an active call, the Attendant can **drag-and-drop** calls to transfer them to the below places.

DYNAMIC CALL PARKING

You can also enable Dynamic Call Parking from the Attendant Console. Call Park enables you to put a call into a parking orbit so that another user can then retrieve the call when they are available. Dynamic call park will place the caller in the first available parking spot. While static call parking parks the call on a specific extension.

CONTACT TAB

The Contacts tab provides you an overview of all the contacts in your organization and provides a status indicator. A green circle displayed next to a user's name and extension means that the user is currently available. A red circle means the user is currently unavailable as they are already on the phone with another user or set their status to Do Not Disturb. Clicking on an extension will bring up a new window, where you can call the contact at their extension, their work contact, mobile number, or their home contact number. You can also leave a voicemail for the contact as well.

CALL QUEUES TAB

The Call Queues tab will give you an overview of how many Call Queues your organization has, and the number of agents logged into each queue

AUTO ATTENDANTS TAB

The Auto Attendants tab will provide you with an overview of the Auto Attendants in your organization and allow you to click on them to call them.