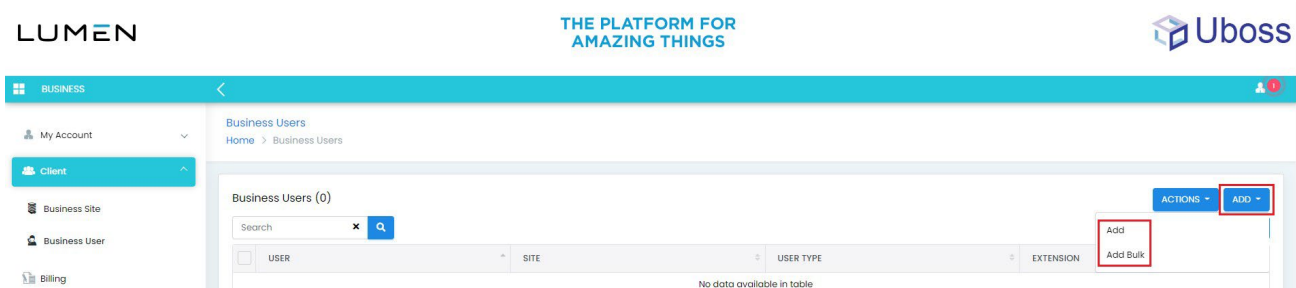


Adding a new user to a business

November 2022

At business level select 'Client' -> 'Business User' from the top blue menu. On the next screen press 'Add'



You will now be taken through a wizard to set up the new user. If any areas are completed incorrectly, these will be highlighted and you will need to amend them before you can complete.

Contents

- Step 1 – General – Profile details**
- Step 2 – Package, device & number assignment**
- Step 3 – Service assignment**
- Step 4 – Credit limit**

Step 1 – General – Profile details

Select the Site Name where the user is based and then select User Type (normally Hosted). Input the new user's first and last names. If you have Departments set up, select which department the new user will be in. Leave the '**Login ID**' box empty and the system will automatically enter a login id based on the telephone number you allocate the user.

Input a password which should include alpha and numeric digits and at least one special character, one upper and one lower case alpha – a minimum of 8 characters. This will be needed by the user to access their call logs on Uboss as well as for any apps they have assigned. Enter the user's Contact Email and Contact Mobile Number - but you can leave these blank. (NB The user's email address will be their username on Webex if assigned).

Now press



Step 2 – Package, device & number assignment

For the Primary Package, select the required license type from the drop-down box. Then select any additional secondary packages required.

For the Primary Device choose the model of phone you are allocating the new user. If you already have the device select the MAC address in the right hand box or leave this as **'New Instance'** and type in the new MAC address in the next box.

If you don't have or know the device details leave this set to **'No Primary Device'**. You can go back into the user later and add the device.

Select the number you are allocating the user from the **'VoIP Number'** drop down box or alternatively, if they are just having an extension number input this or allow the system to allocate the next available extension by pressing **'Get Next Extension'**. An extension number can be any number apart from emergency services or informational numbers e.g. 999, 112, 123, 111, 101 etc.

The **'CLI Phone Number'** will be the outgoing number presented when making a call e.g. 0203123123456. If left blank your main Business number or DDI (if assigned) will be presented.

Now press



Step 3 – Service assignment

Select any additional services required for this user from the selection given. If you hover over the description it will show the set up and monthly rental costs.

Now press



Step 4 – Credit limit

Here you will see the default credit limit and email alert - normally £15.00 and 80% respectively.

Now press



If there are any errors, you will see an error message and it will tell you which step needs to be amended. Click back into that step using the blue buttons, make the amendment and then select step 4 and press finish again.