Your Atlas Portal Access

Logging into Atlas Portal

The new portal is located at this address: **https://www.my.quantumtel.net**

You will receive an email with your login name and temporary password. Use that link to access your portal for the first time and to change the temporary password.

Editing and Navigating Atlas

This document is meant as a quick guide on editing components in Atlas. This guide assumes that you have full permissions in the Atlas portal. Any place where you are unsure of the available option, mouse-over the option and you will see your cursor change to a question mark. Hold the mouse steady for 2 seconds and a tooltip will pop up aiding in explanation.

Phone Numbers

Navigate to VOIP > Phone Numbers > Select Phone Number to Edit

- Use the drop down the Route To list, and select the destination category. I.E. – Time of Day. A secondary box will appear where required so you can then define the specific destination. I.E. – Business Hours

Device Users

Device users are a new feature that allow a single user to be associated with more than one phone/device at the same time while keeping the same extension number for all devices, much like a group. The extension number is defined at the device user instead of the phone/device itself. A device user can have their cell phone assigned to them as well as their desk phone and home phone. When a device user has a log in to the portal, they can edit their call routing logic at any time, giving them greater freedom and flexibility.

Navigate to VOIP > Device Users > Select User to Edit

- Basic USER INFORMATION includes their email addresses, time zone, extension number, voicemail ON/OFF, voicemail to email ON/OFF, and whether or not include them in the company directory.
- Under CALL LOGIC, there are choices on how and where to route calls, ring duration, and caller ID options for that device user both internal (on-net) and external (off-net) calls.
- The DEVICES section visually displays what devices are currently assigned to this user, and ring durations if Find Me Follow Me is enabled.
- You can assign existing devices to this user – the drop down list will only list devices that are currently available and not already assigned to another device user.
- RESTRICTIONS allow you to set calling restrictions for that device user. Please note, "Inherit" will pick up your account restrictions, and not necessarily allow those kinds of calls. Please reach out to your account representative if you need to update your account restrictions.

Devices

Navigate to VOIP > Devices

- You may select a device to view the device information.
- The list view of devices red/green demonstrates whether the phones are online or offline.

Virtual Extensions

Navigate to VOIP > Virtual Extensions

- You may select a virtual extension to edit its routing, but you may not add additional virtual extensions. Please reach out to your account representative if you require additional virtual extensions.

Voicemail Boxes

Navigate to VOIP > Voicemail Boxes > Add/Edit Voicemail Box

- You may configure the voicemail boxes for all the users
- You can upload new voicemail greeting recordings from here
- You can reset the mailbox PIN number, and adjust other mailbox options
- You may add additional mailboxes

Time of Day Routing

Navigate to VOIP > Time of Day Routing

- Time of Day Routings are a way for you to configure different call routing depending on the time of day, just like the time frames in our old system.
- When editing:
  - Set the time zone of the time of day
  - You will see a slider that reads INSIDE or OUTSIDE
    - If you want to enable the time of day for that specific day, slide the bar to INSIDE. Then set your time frame. For example, between 9am and 5pm.
    - If you want the call to go to the "Outside Timeframe Route" for the entire day (like a weekend day), set the slider to OUTSIDE
  - Set your Inside Timeframe Route and your Outside Timeframe Route
    - Between the hours you've defined, the call will go to the Inside Timeframe Route (Example: Between 9am and 5pm, send the call to our open menu)
    - Outside of those defined hours, or if the entire day is slid to OUTSIDE, the calls will be sent to the Outside Timeframe Route (Example: Before 9am and after 5pm, send the call to our closed menu)

Menus

Navigate to VOIP > Menus > Select Menu to Edit

- You may allow/disallow extension dialing from the menu. This is when a caller can simply dial someone's extension off the menu even though it's not part of the menu options.
- You may update the menu greeting/message
- To route a call, select the button option you would like to use, drop down the Route To list, and select the destination category. I.E. – Device User. A secondary box will appear where required so you can then define the specific destination. I.E. – John Smith

Groups

Navigate to VOIP > Groups

- There are two kinds of groups
  - Device Users
    - Ring all the device users and all their assigned devices
  - Devices (Recommended)
    - Ring all the devices
- You can now enable music playing to the caller while the phones are ringing instead of the caller hearing ringing
- Simply click and drag the devices from the available column to the selected column

Holiday Routing

Navigate to VOIP > Holiday Routing

- You may add/edit any company holidays you have.

Accounting

We have the ability to email your invoice as a PDF attachment to your billing contact when your invoice is auto-generated in Atlas. If you would like this change, please reach out to your account representative.

Once logged into Atlas, navigate to the Finance link on the top navigation bar. You will see a left-side navigation bar of Account Details, Orders, Invoices, and Payment Profiles.

- Account Details will give a short overview of the company information we have on file for you as well as all your active users. If your customer information ever needs to be changed, please reach out to your account representative so we may keep our information up to date
- Your current active order will be listed under Orders > Open
- Your new invoices will be listed under Invoices > Invoices
- Payments in the new system will be listed under Invoices > Payments
- If you are a Credit Card customer, under Payment Profiles you can manage your cards

Activity Report

The activity report resides under Reports > Call History Report

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REPORTS

(Click on the REPORTS icon to enter the reports menu)

The main page shows the CALL RECORDS reports generator. This is where you can detail running a report based upon choices. Leaving choices blank will output all choices.

Search – Type in anything that you may want to be specific in the search fields such as a phone number or name. Leave blank otherwise

Device User – Dropdown and select a specific user or leave blank for all users

Direction – Select Inbound or Outbound calls. Leave blank for both call directions

Start Date and **Time**

End Date and **Time**

Call Type – You may choose INTERNAL to see only internal calling reports. Otherwise leave as External

Show Branches – Set to YES so you can see how the call was handled if it was transferred or placed on hold

FILTER – Click this to Run the Report

Advanced Export allows you to export a search to a csv file

Once you set the parameters in the selection fields, click on **FILTER**

The report will generate and show on your computer screen

You will get a total call RECORDS count listed at the top of the report just under FILTER

<u>These are the report fields and descriptions</u>

A **GREEN** handset is INCOMING CALLS

A **RED** handset is OUTGOING CALLS

DATE – Shows the first call to last call record on the date(s) you selected

FROM (CALLER ID) – Show the Name and Number of the caller

TO (DIALED NUMBER) – Show the number that was called

OWNER – Shows the user (if known) who made or answered the call originally

DURATION – Shows the duration of the call from start to finish

HANGUP CAUSE – Shows how the call hung up

>   **Normal_Clearing** refers to a normal hang up from one of the callers

>   **Unallocated_Number** refers to a blocked number

>   **Call_Rejected** refers to the called party rejecting the call

This is the Branch icon. Click on this to see the different steps the call took

>   **ACTIONS** – clicking on the document icon will bring up Details of the call. These details are the raw details of the call

To get a report where you can print use the Advanced Export option.