Sipwise Customer Self-Care Handbook

CE

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Chapter 1. Introduction

1.1. Welcome

This handbook is your guide to the Customer Self-Care portal CE edition, the web page where you manage your own telephone line. From here you can see who has called you, change how your calls are handled, listen to your voicemail, send a fax, and much more, all without needing to understand how the underlying phone system works.

You may also hear this page called the "CSC portal" or "CSC panel", CSC simply stands for Customer Self-Care.

1.2. Who This Handbook Is For

This handbook assumes no technical background at all. Wherever a feature uses a term that isn't everyday language, for example an abbreviation shown in the portal itself, this handbook explains what it means the first time it comes up, so you never have to guess.

Most of this handbook, gathered together as **Everyday Features and Personal Settings**, describes features that every subscriber can use to manage their own phone: making and receiving calls, voicemail, call forwarding, faxes and similar personal settings.

Some accounts, however, are also responsible for a whole company's phone system rather than just a single line: colleagues' extensions, shared company contacts, the automated attendant, number assignment and so on. If your account has this extra responsibility, your portal shows two additional menu entries that a regular subscriber does not see: **PBX Statistics** and **PBX Configuration**. If you see them, the second half of this handbook, **Administrator Settings**, is written for you; if you don't, you can safely skip it, since none of it applies to your account.

1.3. A Note on Feature Availability

Not every feature described in this handbook is guaranteed to be available on your own system. Some of them depend on optional modules or licenses that your operator may or may not have installed or activated. If a feature described here doesn't appear in your portal, or doesn't behave quite as described, that's most likely the reason, it isn't a sign that something is broken.

Wherever this applies, the chapter covering that feature notes which module or license it requires, so you know exactly what to ask your operator to enable if you'd like to use it.

1.4. What You Can Do From the Portal

However your account is set up, the Customer Self-Care portal generally lets you:

- See a list of your recent calls, voicemails and faxes.
- Decide what happens to calls you don't answer, or don't want to answer at all.
- Listen to and manage your voicemail messages.
- Send and receive faxes.
- Keep a personal address book and set up speed-dial shortcuts.

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- Change your password and see which phones or apps are currently registered to your line.

Every one of these is covered in its own chapter later in this handbook, with screenshots of the actual portal to guide you along the way.

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Chapter 2. Getting Started

2.1. Signing In

To open the Customer Self-Care portal, go to the web address your operator gave you and sign in with the **username** and **password** you were provided. The username usually looks like an email address (for example `username@yourdomain`), this is not necessarily your actual email address, just the format the sign-in page expects.

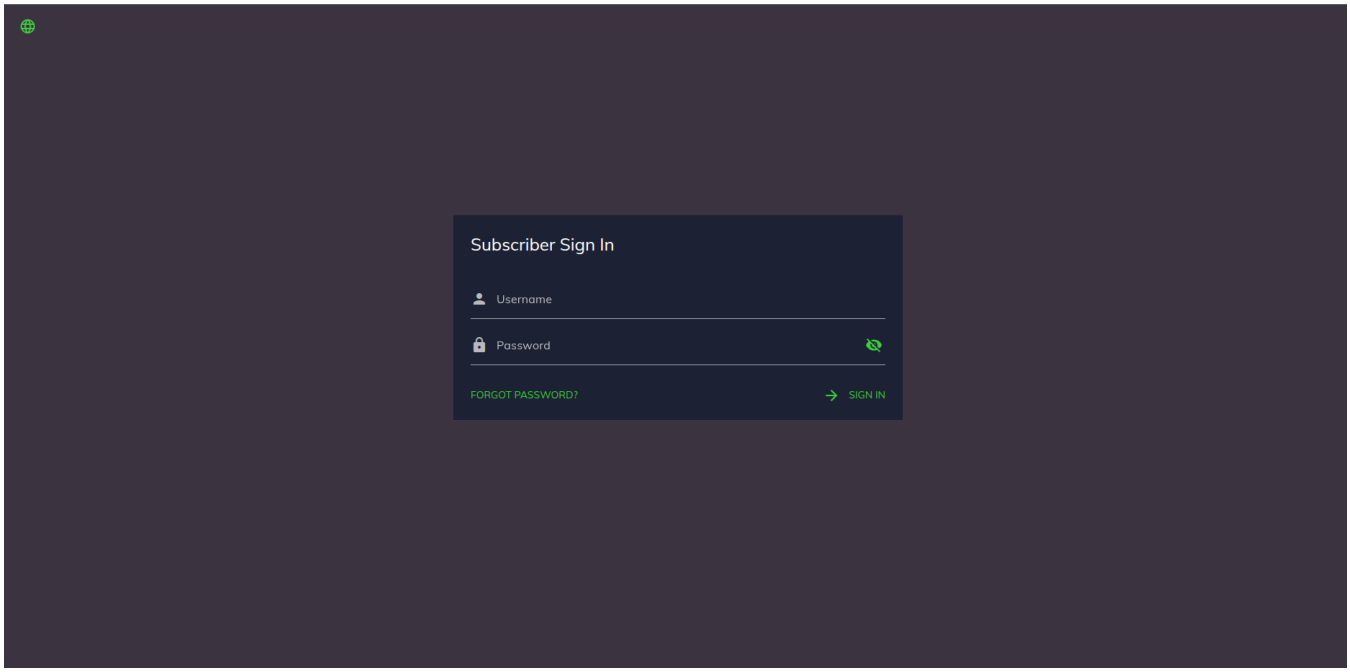


Figure 1. The sign-in page

If you forget your password, select **Forgot password?** on the sign-in page, enter your username, and follow the instructions sent to you. This only resets the password you use for the web portal; it never changes how your phone itself connects to the service, so you don't need anyone's help to reset it.

2.2. Two-Factor Authentication

Depending on how your operator has set up your account, you may be required to set up two-factor authentication the first time you sign in — an extra check, on top of your password, that proves it's really you. If your account requires it, the sign-in page asks you to set it up as soon as you enter your username and password correctly, before letting you continue.

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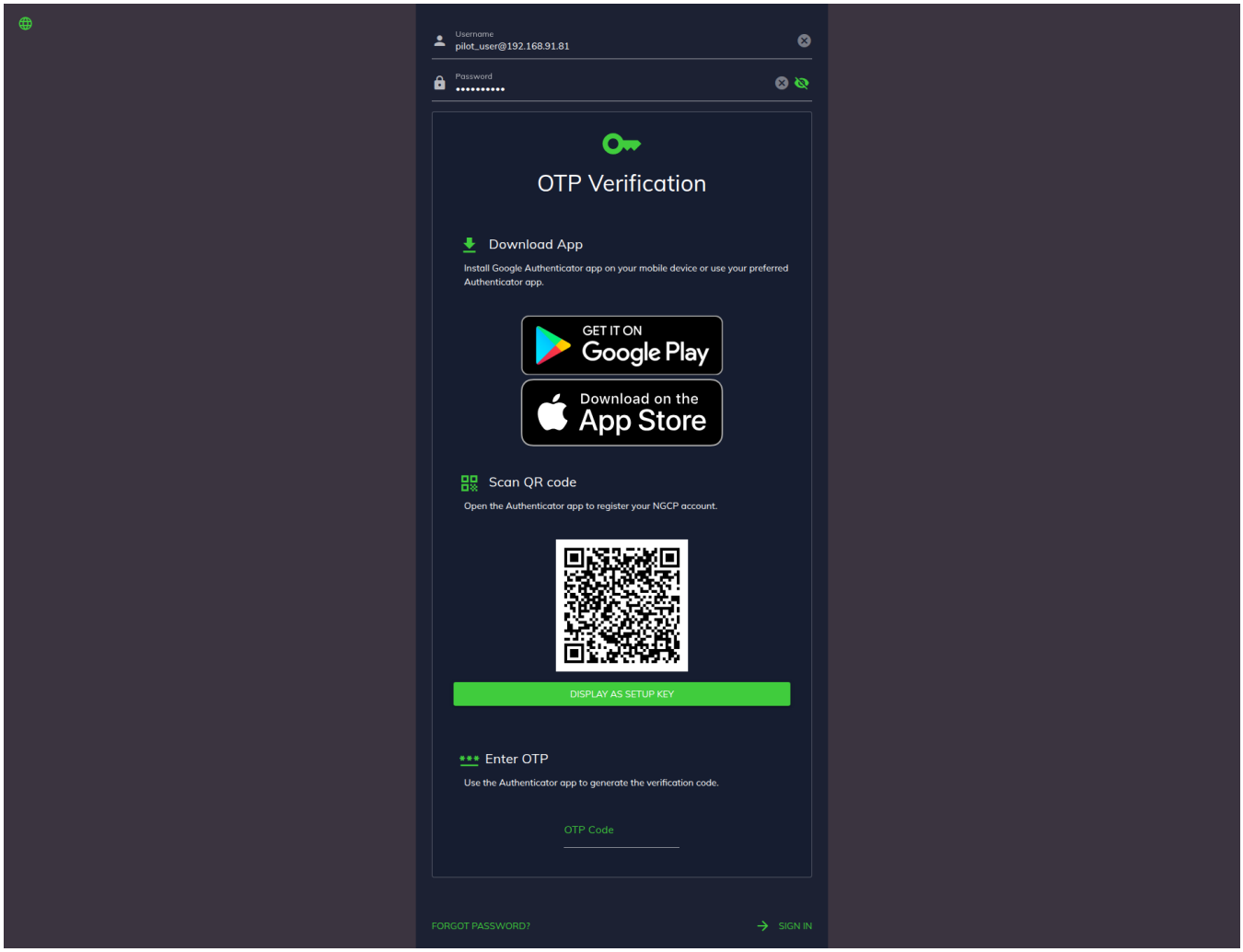


Figure 2. Setting up two-factor authentication during sign-in

Setting it up means installing an authenticator app — such as Google Authenticator — on your phone, then connecting it to your account either by scanning the QR code shown on screen with that app, or, if scanning isn't convenient, by selecting **Display as setup key** and typing the text key it shows into the app instead. Either way, the app then starts generating a new code every few seconds; type the current one into the **OTP Code** field to finish setting it up.

Once it's set up, every future sign-in simply asks for that code after your username and password, without needing to set anything up again.

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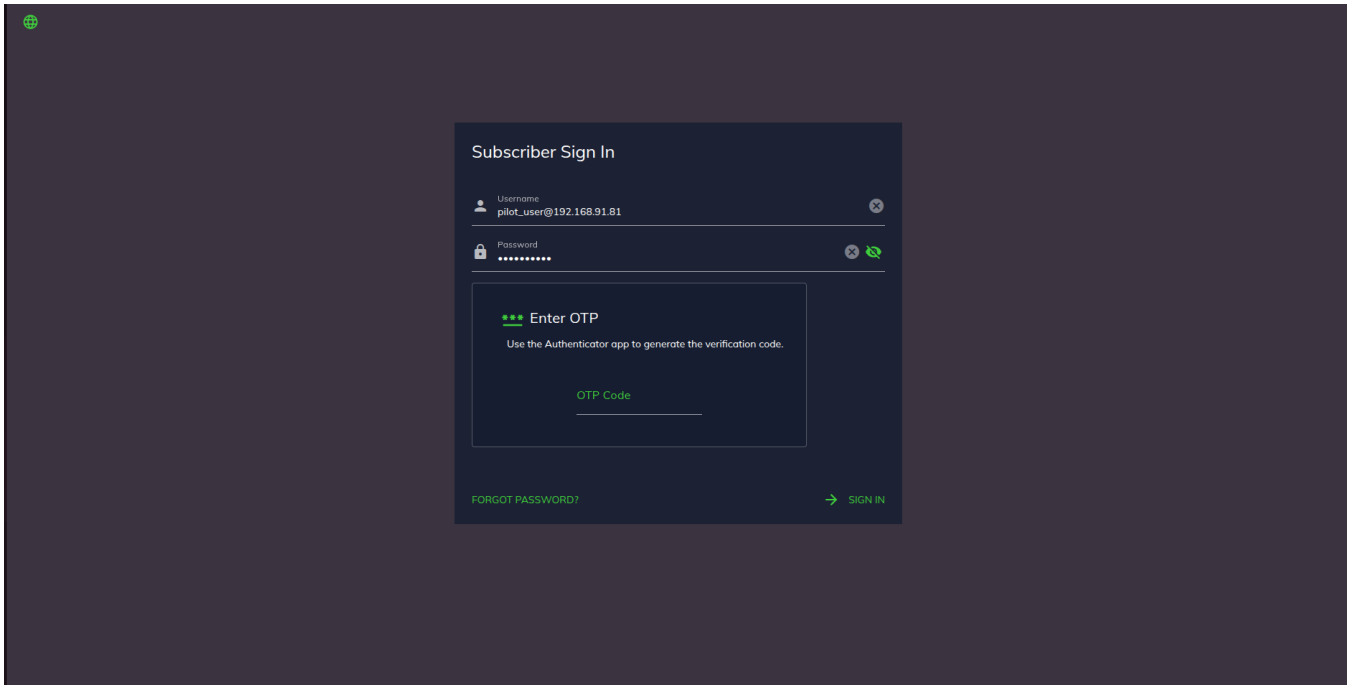


Figure 3. Signing in once two-factor authentication is already set up

2.3. Choosing a Language

The globe icon in the top corner of the sign-in page (and later, of every page in the portal) lets you switch the interface to a different language.

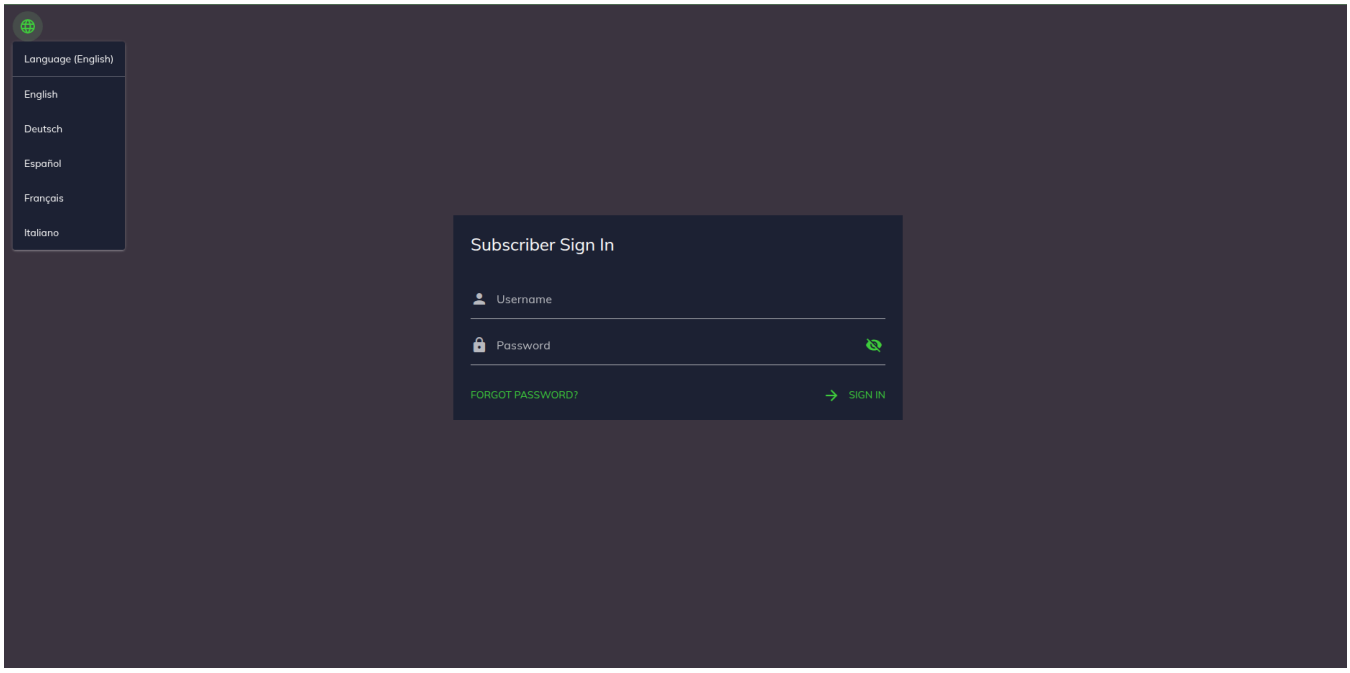


Figure 4. Switching the portal's language

The portal remembers your choice, so you only need to set it once.

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2.4. Finding Your Way Around

Once you're signed in, you land on the **Dashboard**, described in the next chapter. A menu on the left side of the screen gives you access to every other part of the portal. Depending on what your account is set up to do, you'll see most or all of the following:

- **Dashboard** — a quick overview of your line.
- **Start new call** — place a call straight from your browser.
- **Conversations** — your call, voicemail and fax history.
- **Call Settings** — forwarding, voicemail, blocking and other call-related preferences.
- **Registered Devices** — the phones and apps currently signed in with your account.

If you'd rather have more room for the page itself, a small arrow near the top of the side menu collapses it down to icons only, hiding the text labels.

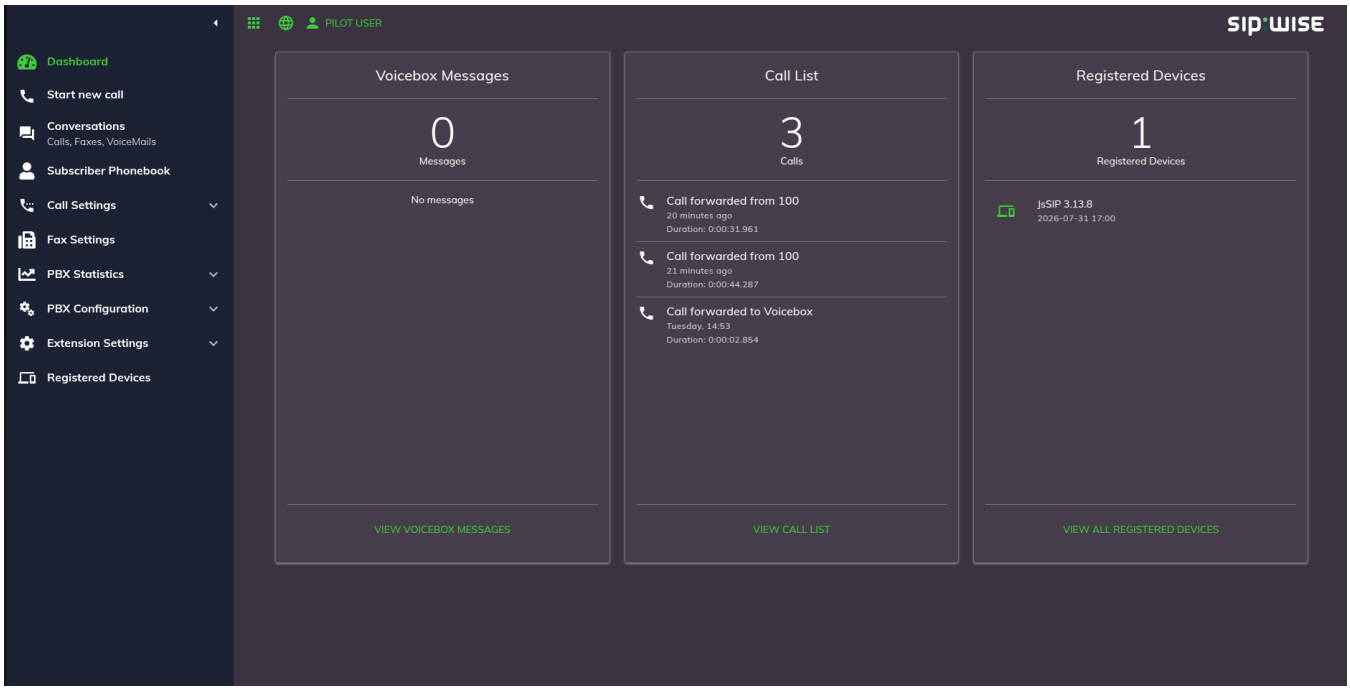


Figure 5. The side menu, with the collapse arrow near the top

To bring the labels back, hover over the collapsed menu: a pin icon briefly appears near the top, and selecting it pins the menu back open.

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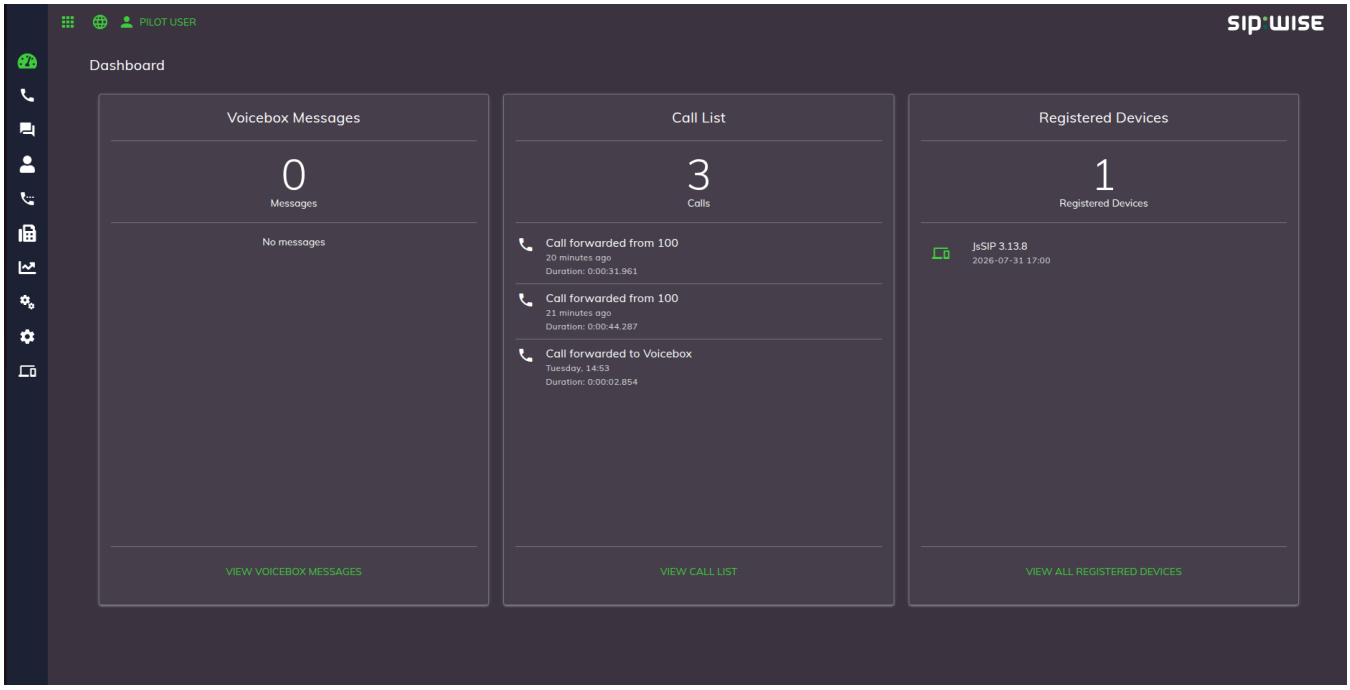


Figure 6. The collapsed side menu

In the top-right corner, your account name opens a small menu with your phone numbers, your account **Settings** (covered in Account Settings), and the option to sign out.

Each of these areas gets its own chapter later in this handbook, in the same order they appear in the menu, so you can simply read on or jump straight to the chapter you need.

2.5. Signing In to the sip:phone App

NOTE This feature requires the **sip:phone** license installed on the NGCP system.

A small QR-code icon next to your account name, in the same top-right corner, and a **sip:phone** logo with links to the Apple App Store and Google Play at the bottom of the side menu, offer a quicker way into **sip:phone**, a dedicated app for making and receiving calls from your phone or computer.

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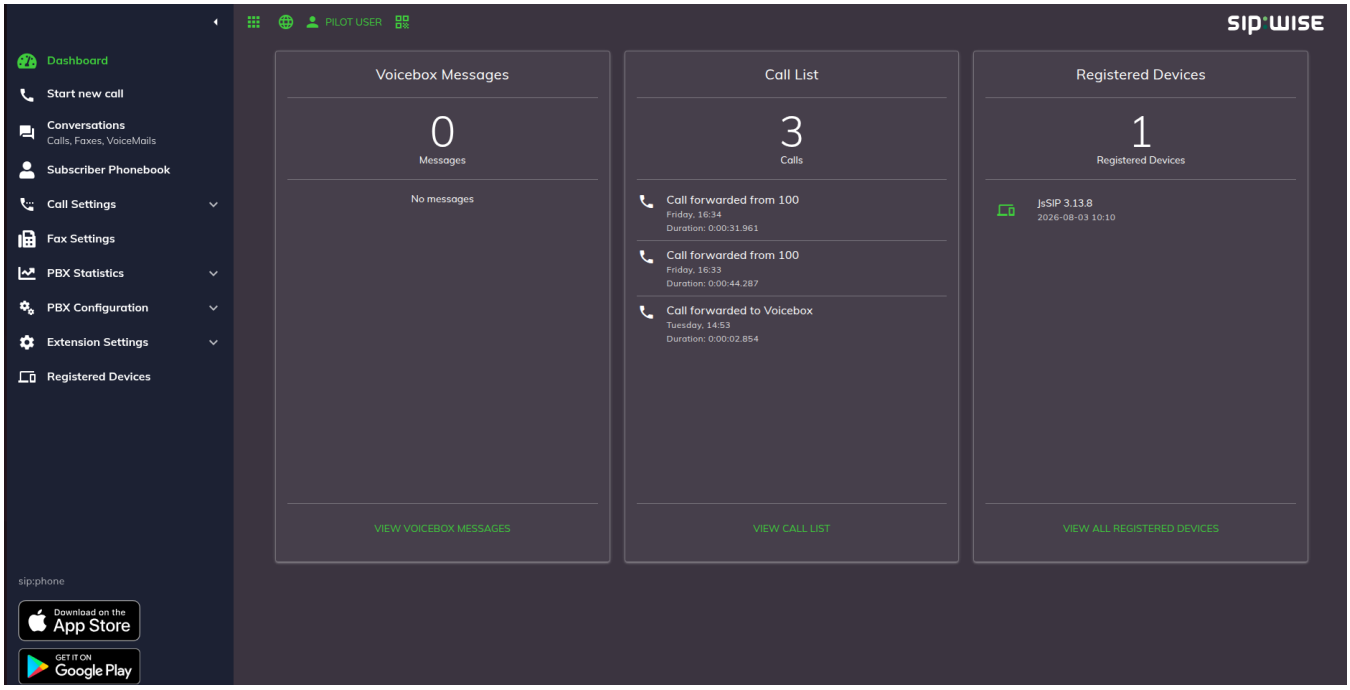


Figure 7. The sip:phone QR-code icon and app-store links

Selecting the QR-code icon opens a QR code on screen; scanning it from within the sip:phone app signs that app straight into your account, without having to type your username and password again.

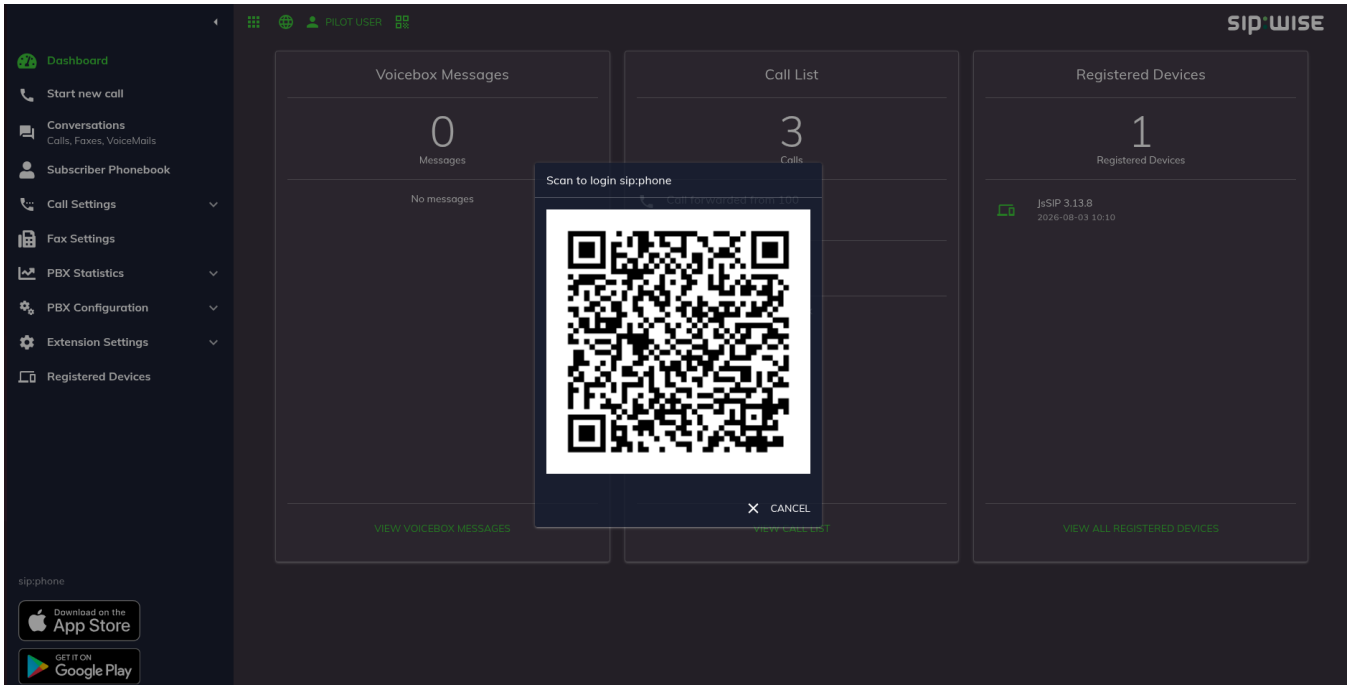


Figure 8. Scanning the QR code to sign in to sip:phone

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Chapter 3. Everyday Features and Personal Settings

3.1. Dashboard

3.1.1. Your Dashboard at a Glance

The Dashboard is the first page you see after signing in, and it gives you a quick summary of your phone line without having to open any other page.

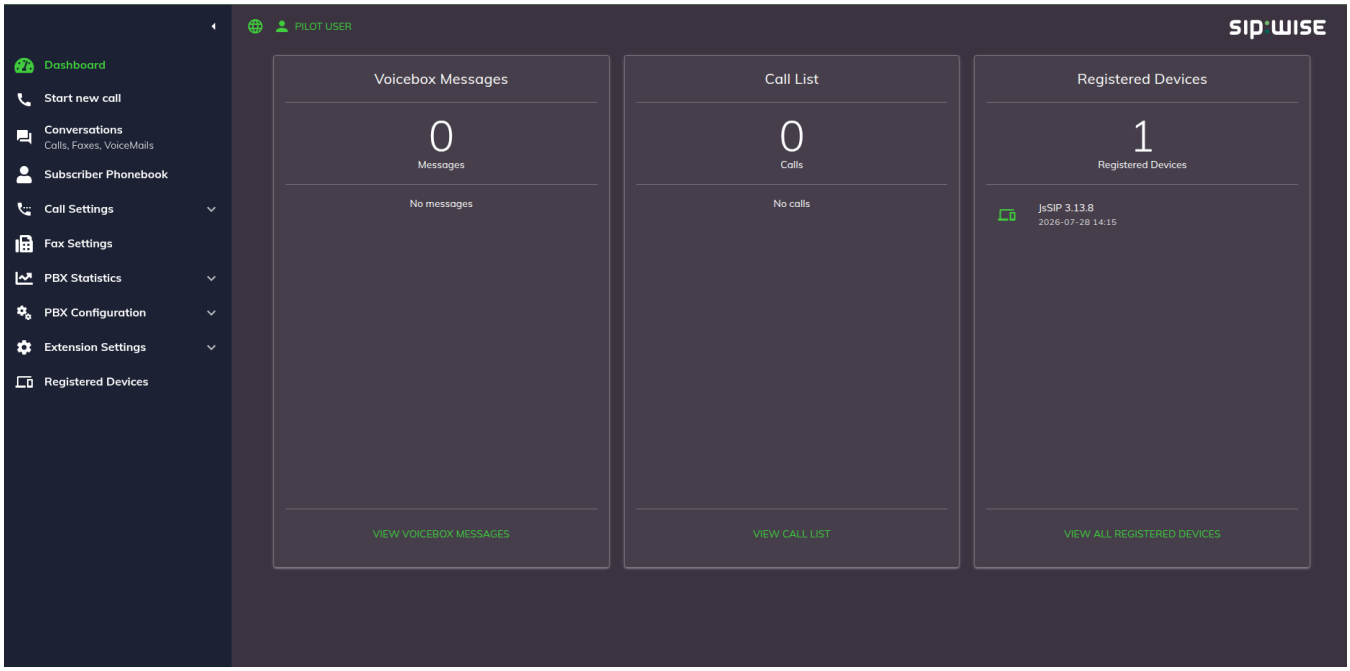


Figure 9. The Dashboard

Three cards summarize the essentials: how many voicemail messages are waiting for you, how many calls appear in your recent call list, and how many devices — phones or apps — are currently registered to your line and able to receive calls. If any of these numbers look wrong (for example, no devices are registered even though your phone is switched on), that's usually the first sign to check your phone's own connection settings, or to contact your operator.

3.1.2. Quick Actions

A small grid icon near the top of the page opens a menu of quick actions you can take without navigating anywhere else — for instance, sending a fax straight away. It's simply a shortcut to something you could also reach through the regular menu, covered in Sending a Fax.

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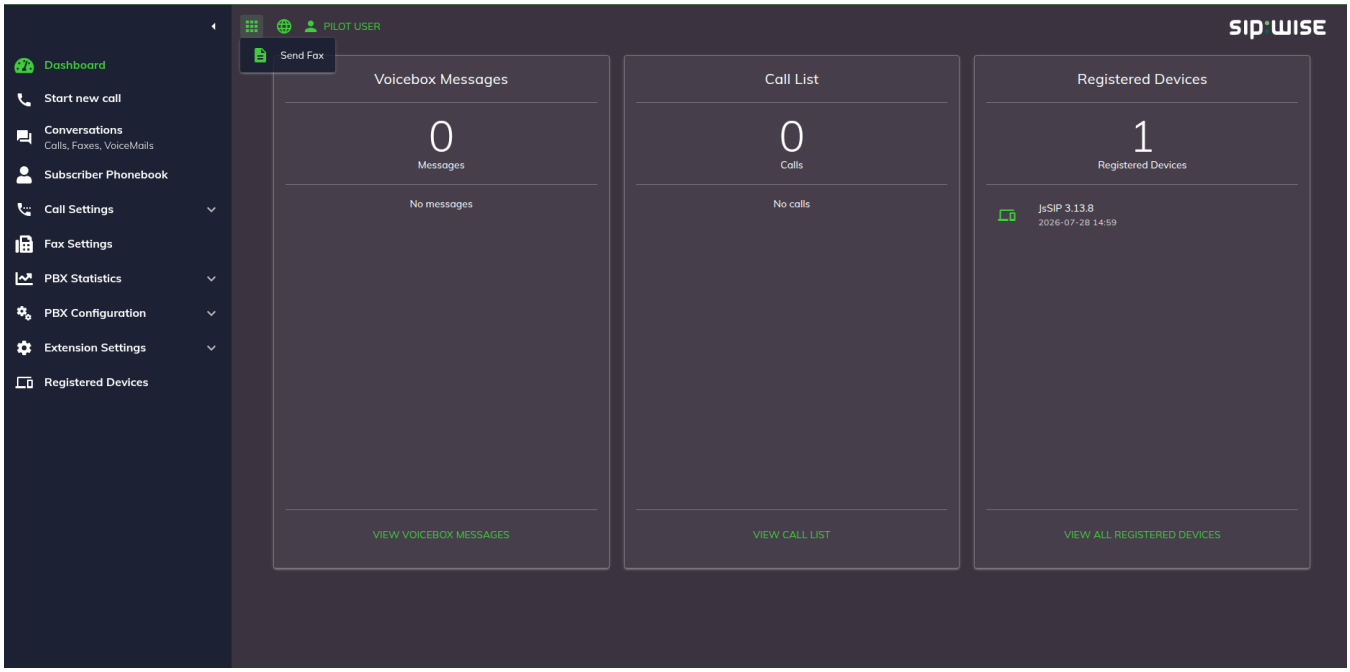


Figure 10. Quick actions from the Dashboard

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3.2. Making Calls

3.2.1. Starting a Call From Your Browser

The **Start new call** page lets you place a call directly from your web browser, without picking up a handset. Type the number you want to reach into the field and select the call button that appears.

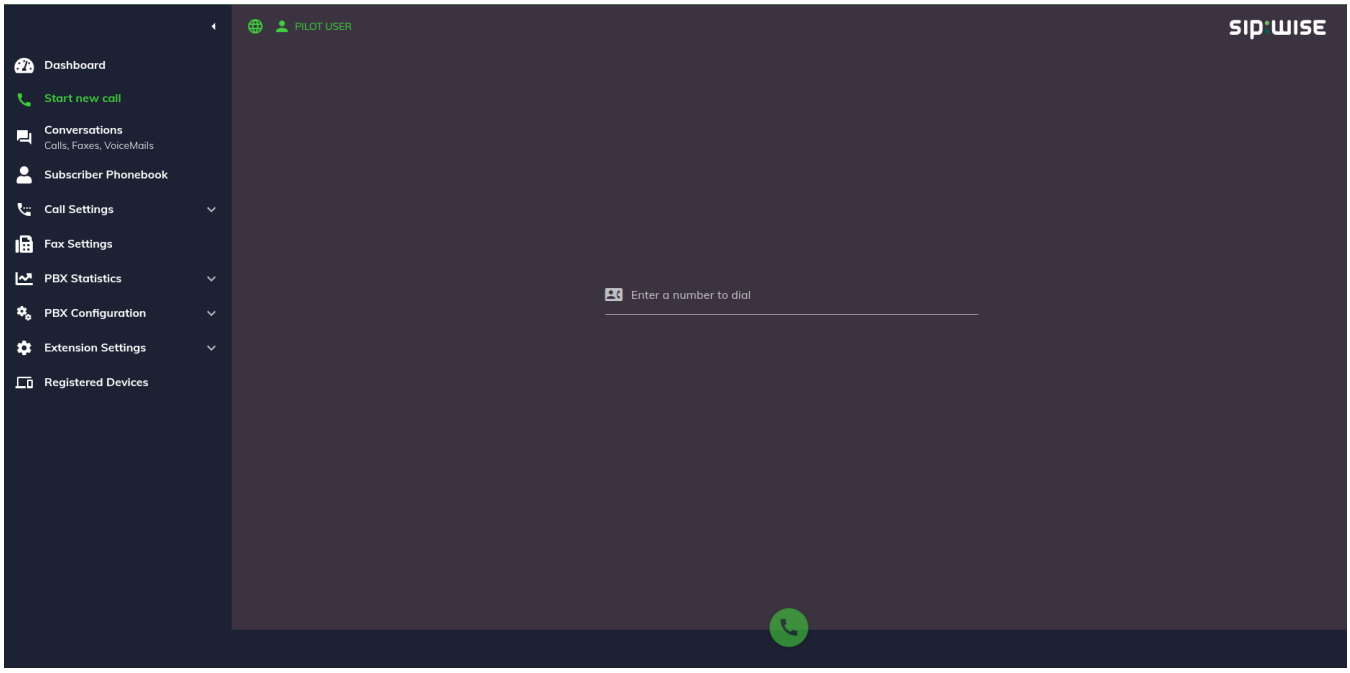


Figure 11. Starting a call from the browser

The first time you do this, your browser will ask permission to use your microphone — this is expected, and needed for the call's audio to work. If you decline by mistake, your browser's own settings let you allow it again for this website.

This browser-based calling is a convenient way to call back a number you see in your history (covered in the following chapters) even when you're away from your desk phone, but it does not replace your regular phone or app: calls that come in while your browser isn't open will still ring on your other registered devices, listed in Registered Devices.

3.2.2. Answering an Incoming Call

When somebody calls your number, the **Start new call** entry in the side menu turns into an alert showing who's calling, and a green button to answer or a red button to decline appears at the bottom of the screen.

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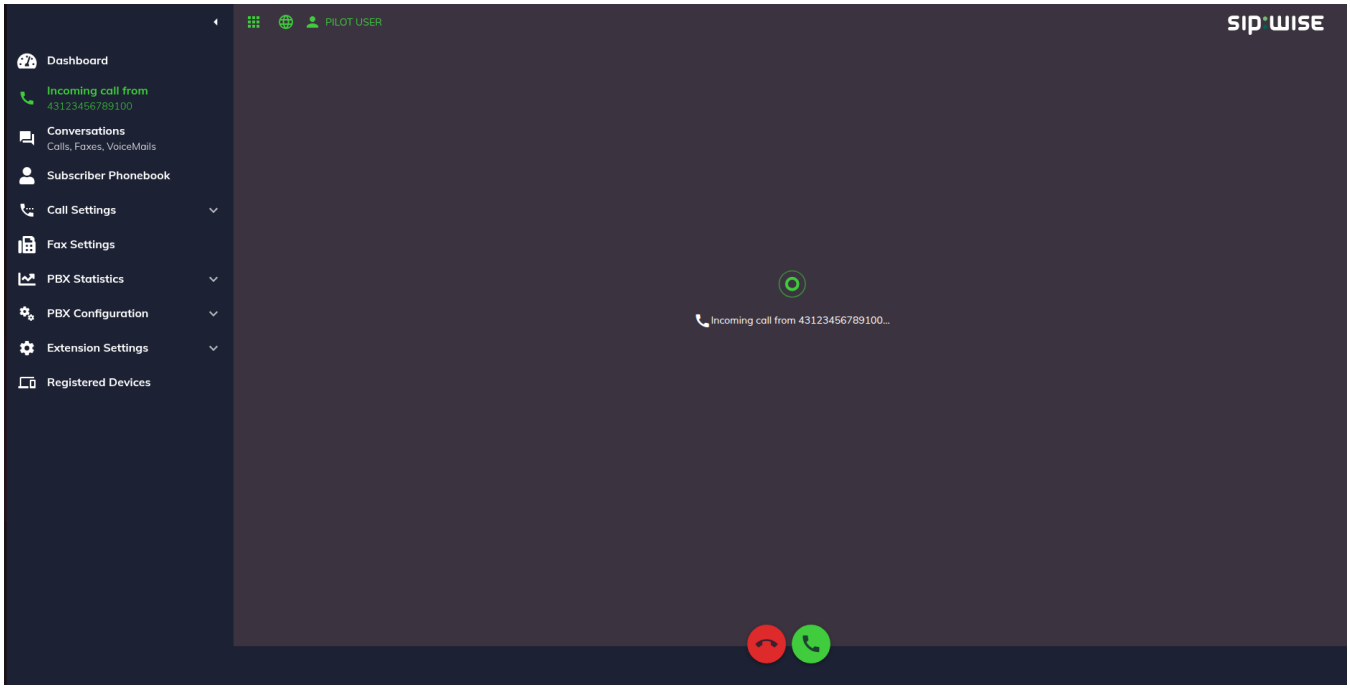


Figure 12. An incoming call arriving in the browser

You don't need to be on that particular page to see it: the same accept and decline buttons follow you as a banner docked at the bottom of the screen no matter which page of the portal you're currently looking at — for example the Dashboard.

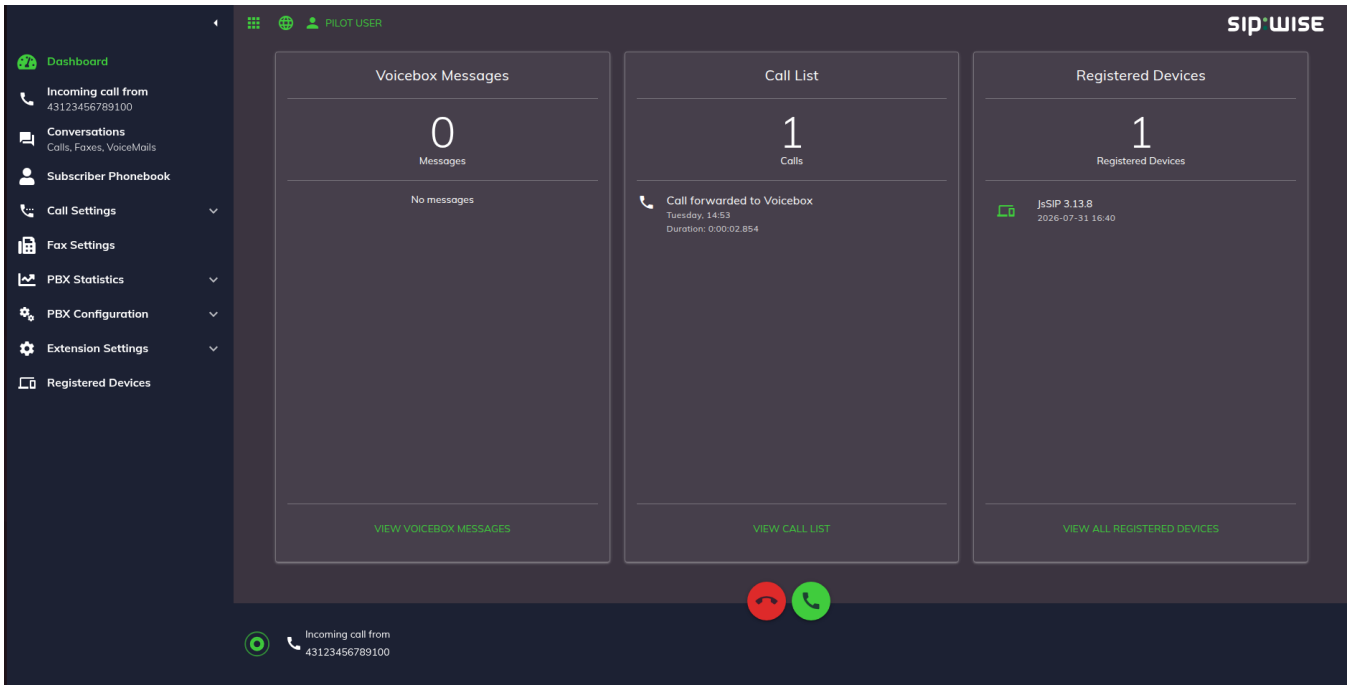


Figure 13. The incoming-call banner shown on the Dashboard

3.2.3. Controls During a Call

Once a call connects, the side menu shrinks down to icons only, giving the call itself the whole screen. A row of buttons along the bottom lets you control it: mute/unmute your microphone, put the call on hold, turn your camera on/off, share your screen with the other party, mute/unmute the speaker, and

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hang up.

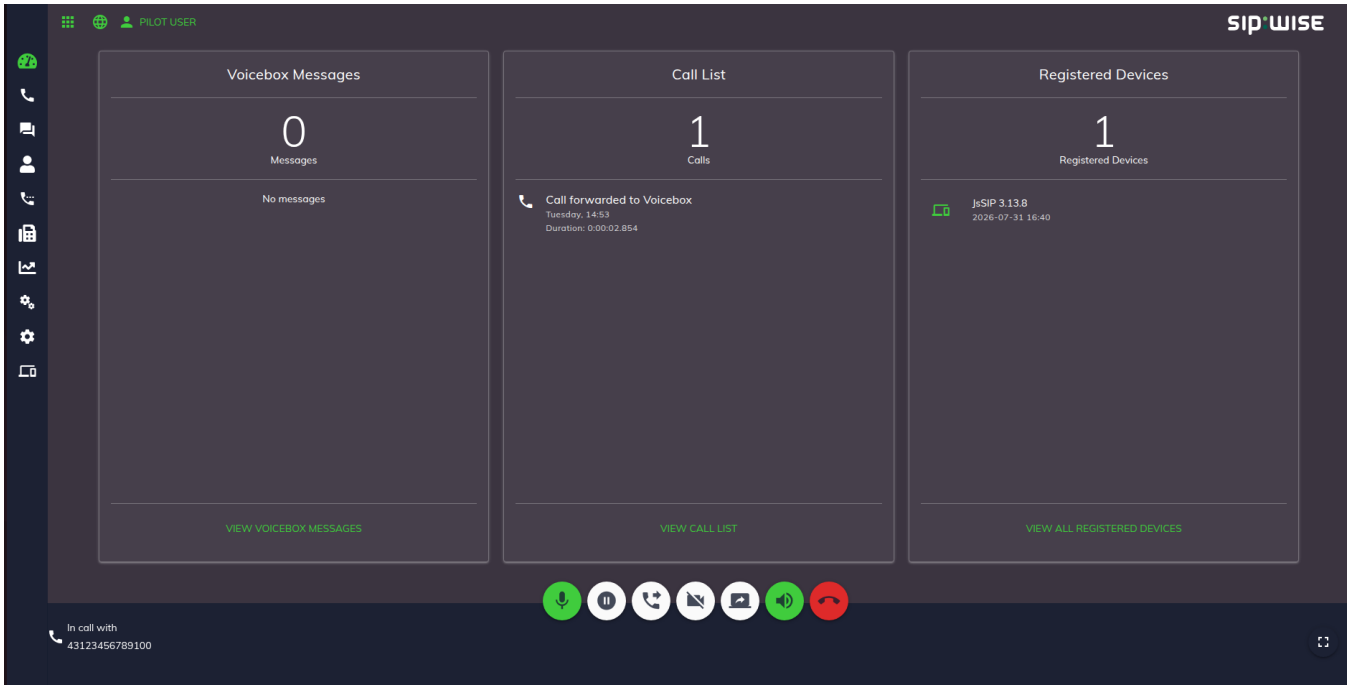


Figure 14. The controls available during a call

3.2.4. Using the Keypad During a Call

Selecting the small keypad symbol next to the "In call with…" indicator opens a number pad over the call, letting you send a tone for each key you press. This is what you need whenever the person or system on the other end asks you to "press 1 for…", or asks for a PIN or extension number once you're already connected — for example when reaching a colleague's voicemail or an automated menu.

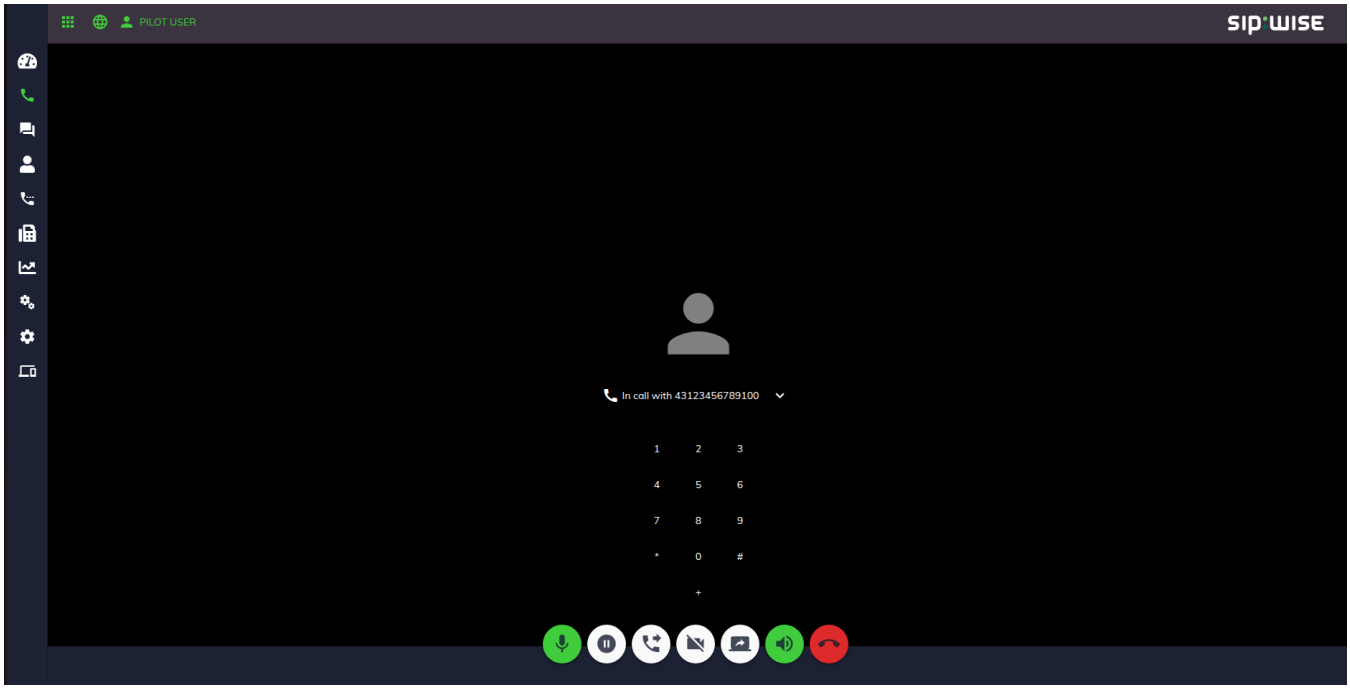


Figure 15. Sending key tones during a call

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3.3. Conversations

3.3.1. Your Call and Voicemail History

The **Conversations** page keeps a record of everything that has happened on your line: calls you made or received, voicemail messages. The **ALL** tab shows everything together, in the order it happened, together with how long each call lasted and, where billing applies, what it cost.

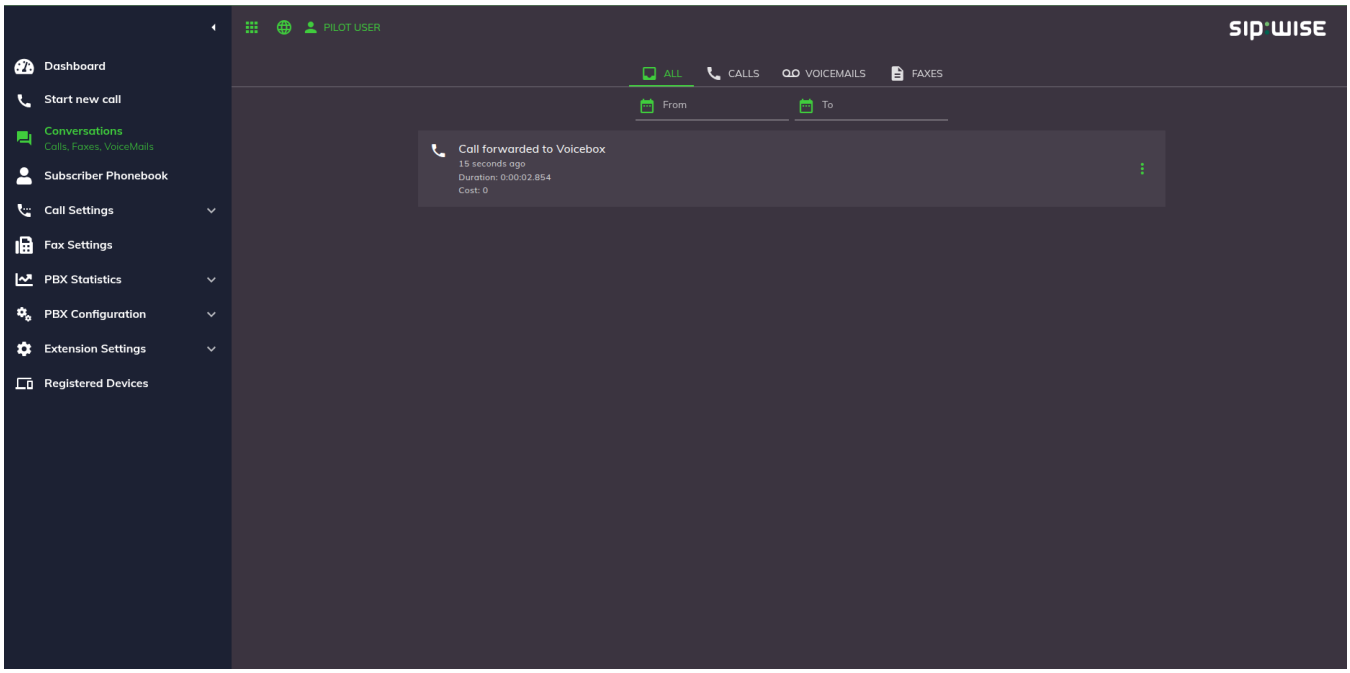


Figure 16. Your call history

Two further tabs — **CALLS** and **VOICEMAILS** - narrow the list down to just one type of activity. A date range at the top of the page lets you look further back than the most recent entries.

3.3.2. Acting on a Call

Selecting the three dots next to any entry in the **ALL** or **CALLS** tab opens a menu of things you can do with that specific call: call the number back, add it to your phonebook, or block it — either just incoming calls from that number, just outgoing calls to it, or both.

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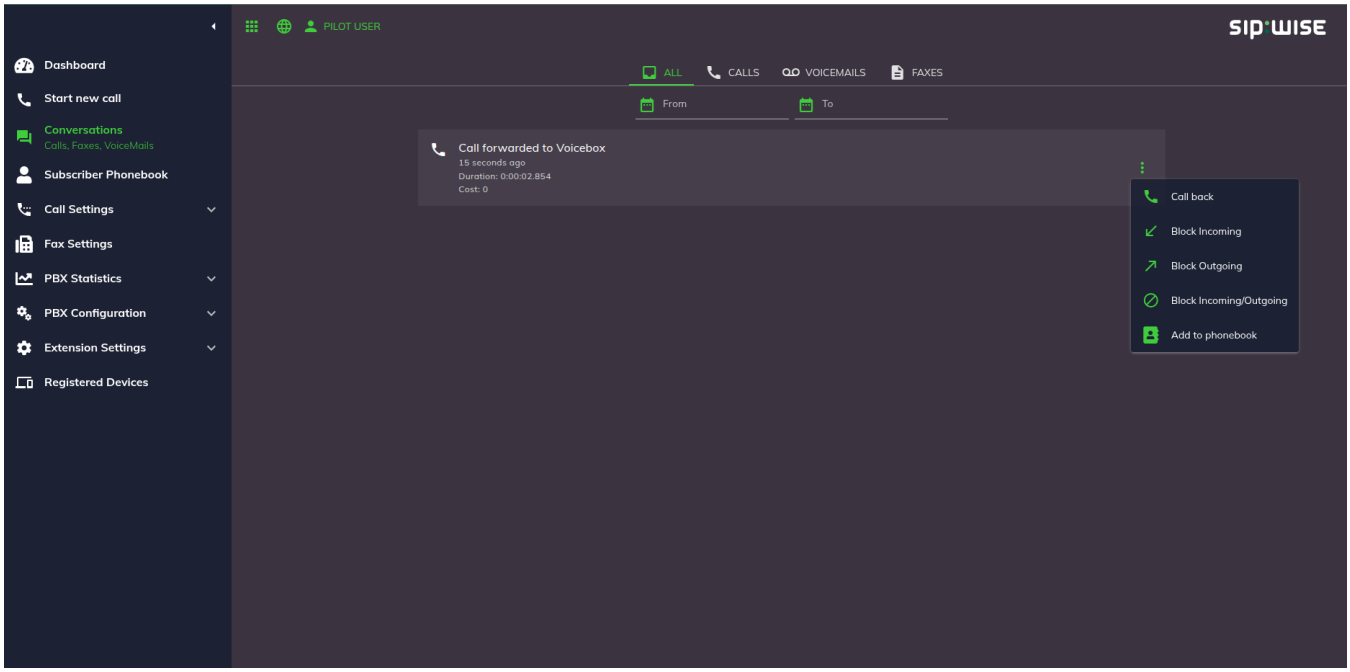


Figure 17. Acting on a past call

Blocking a number this way has the same effect as adding it manually in Blocking Numbers — it's simply a faster way to block a number you've already seen calling you.

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3.4. Call Settings

Call Settings is where you'll find most of the personal settings that control how your own line behaves — from simple switches like Do Not Disturb to more detailed features like call forwarding, blocking, privacy, speed dial, reminders and recordings. The rest of this chapter walks through each of these, one at a time.

3.4.1. General Call Behavior

The **General** tab under Call Settings holds two simple switches that change how your phone behaves during a call.

Music on Hold plays music to the other person whenever you put them on hold, instead of silence. **Do Not Disturb** — often shortened to **DND** — is a switch you can turn on when you don't want your phone to ring at all; while it's on, callers are treated as if you didn't answer, and are handled according to the rules you set up in Call Forwarding.

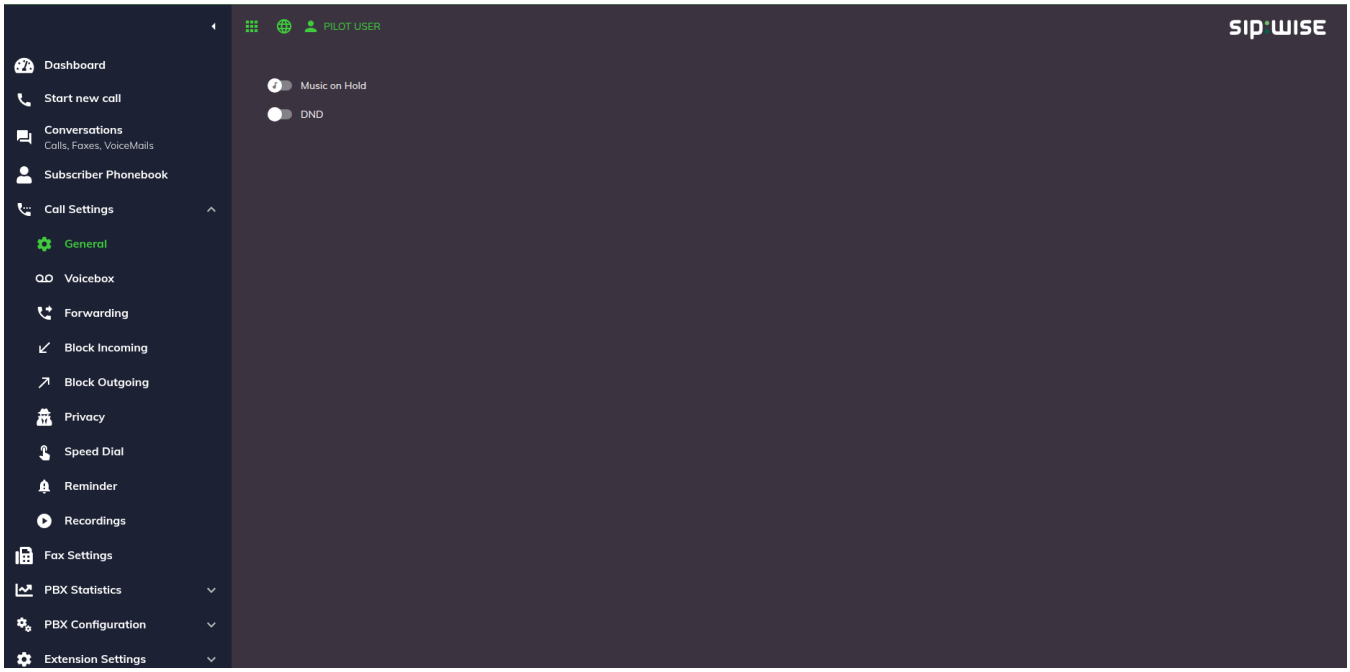


Figure 18. General call settings

3.4.2. Voicemail

Your Voicemail Settings

The **Voicebox** tab under Call Settings — "voicebox" is just another word for voicemail — is where you manage everything about the messages callers leave you when you can't answer.

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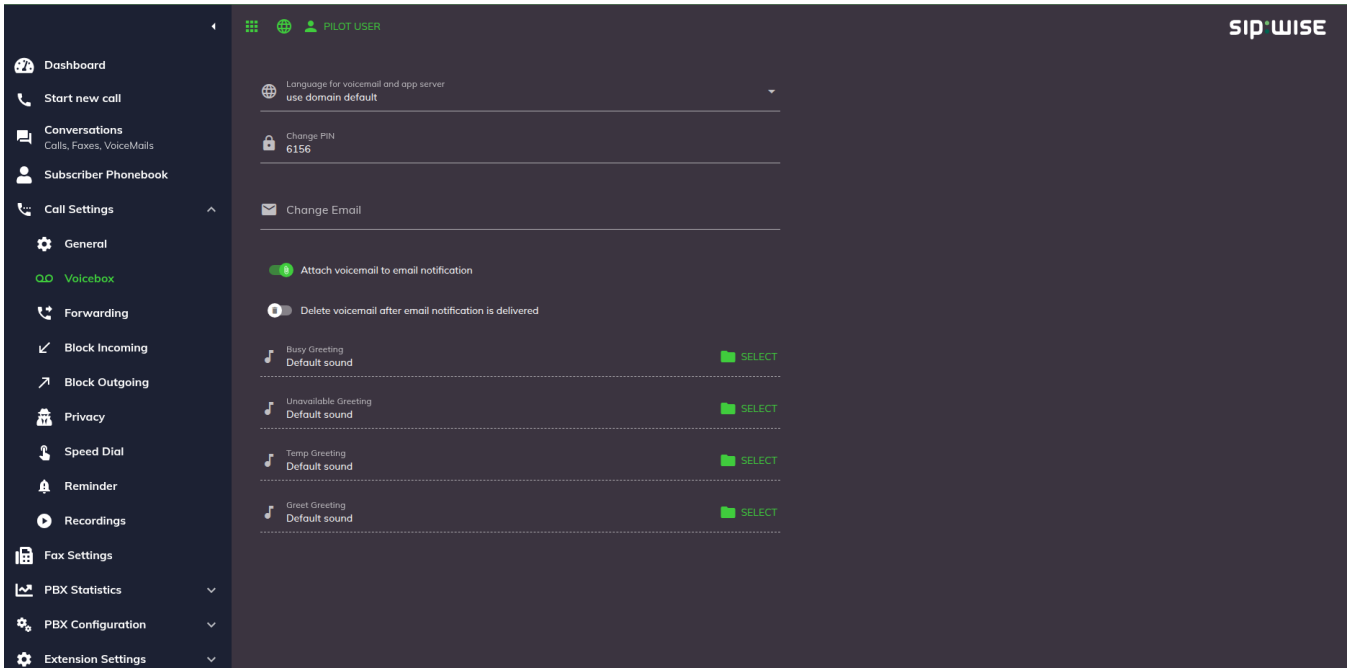


Figure 19. Voicemail settings

Here you can change the **PIN** you use to listen to your messages by phone, change the **email address** your voicemail notifications are sent to, and decide whether a recording of the message itself should be attached to that email — handy if you'd rather listen from your inbox than dial in. A related switch lets you delete a message automatically once it has been emailed to you, so your voicebox doesn't fill up with messages you've already heard elsewhere. A **language** option controls which language the automated voicemail system speaks to your callers in.

Recording Your Greetings

Four separate greetings cover different situations: one for when you're already on another call, one for when you don't answer at all, a standard default greeting used otherwise, and a temporary one you can switch on for a short period — for example while you're on vacation — without losing your normal greeting underneath it. Each greeting starts out using a generic default recording, until you upload your own.

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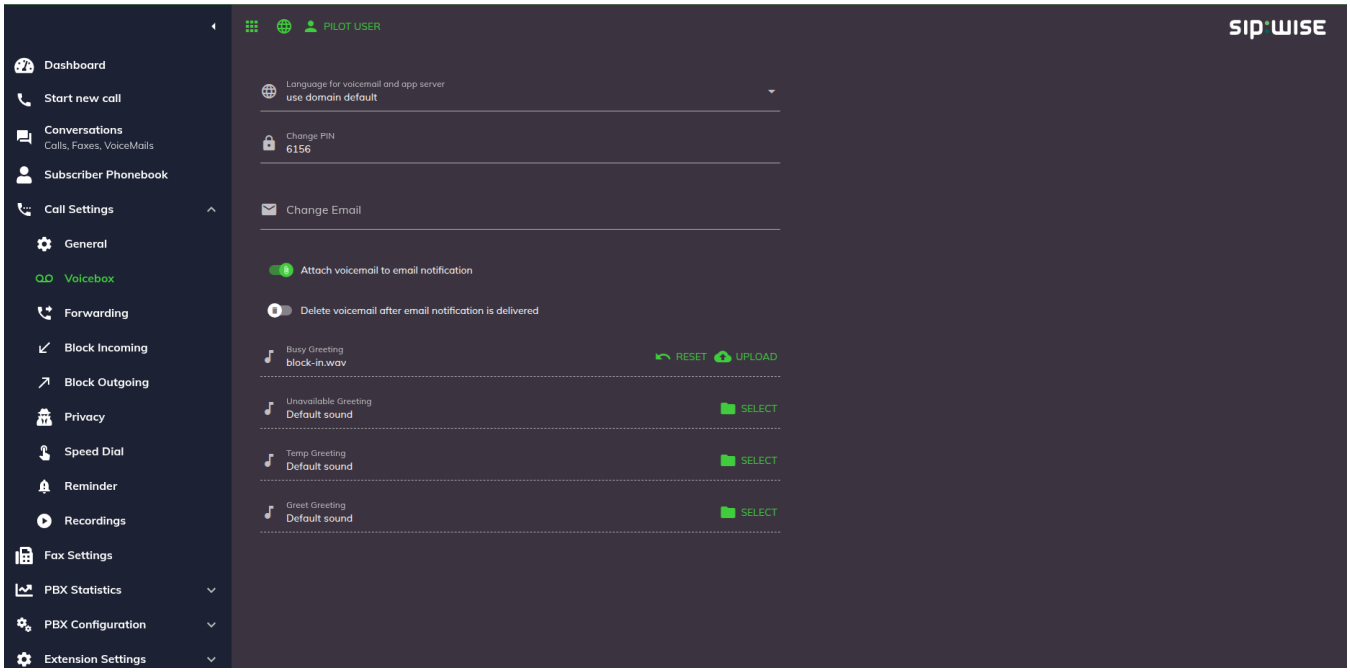


Figure 20. Uploading a personal greeting

3.4.3. Call Forwarding

Deciding Where Your Calls Go

Call forwarding lets you send incoming calls somewhere other than your own phone. The **Forwarding** tab under Call Settings groups your rules into four situations: **Always**, **If not available**, **If busy**, and **On no answer** — so you can, for example, always forward calls to your mobile while also setting up a different rule for when you simply don't pick up in time.

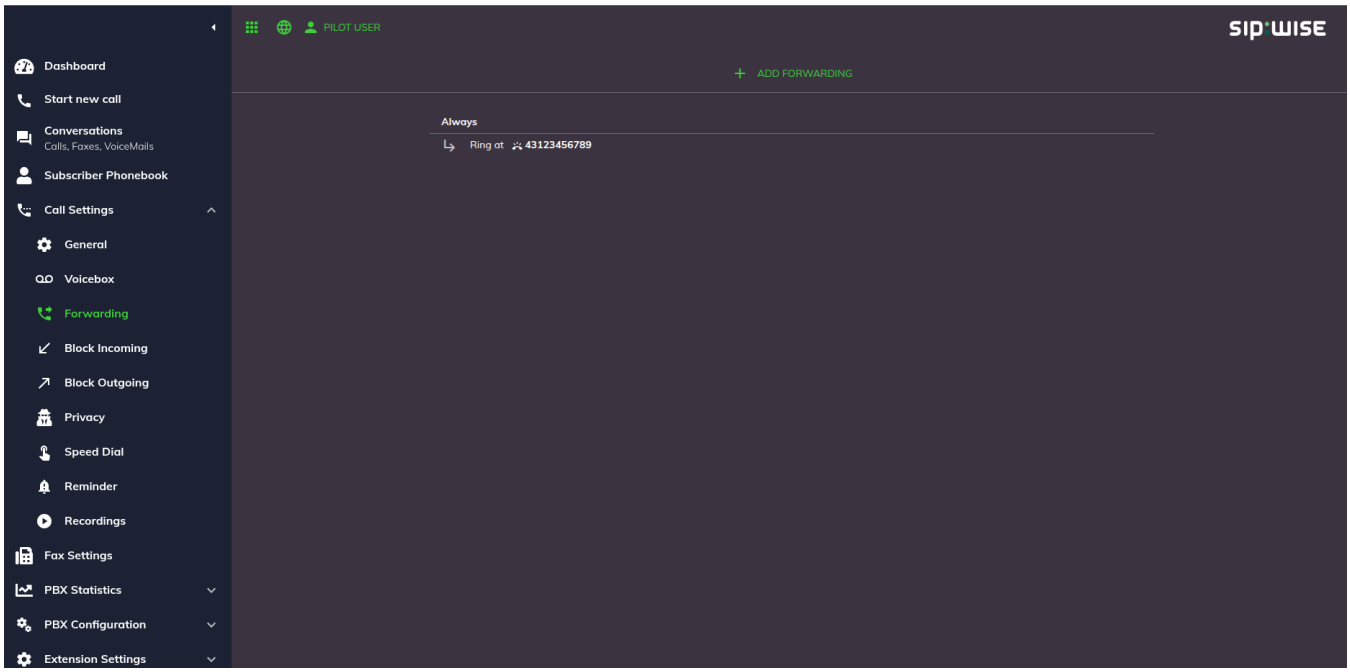


Figure 21. Your forwarding rules

Each rule can be switched on or off at any time without deleting it, so you can prepare a forwarding rule

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in advance — say, for when you're on vacation — and simply flip it on when you need it.

Where a Call Can Be Forwarded To

When you create or edit a rule, **Forward to** offers a wide range of destinations: another phone number, your voicemail, a conference room, a recorded announcement, a fax-by-email address, and several more advanced options that this handbook covers in their own chapters, such as an automated menu (see Extension Features).

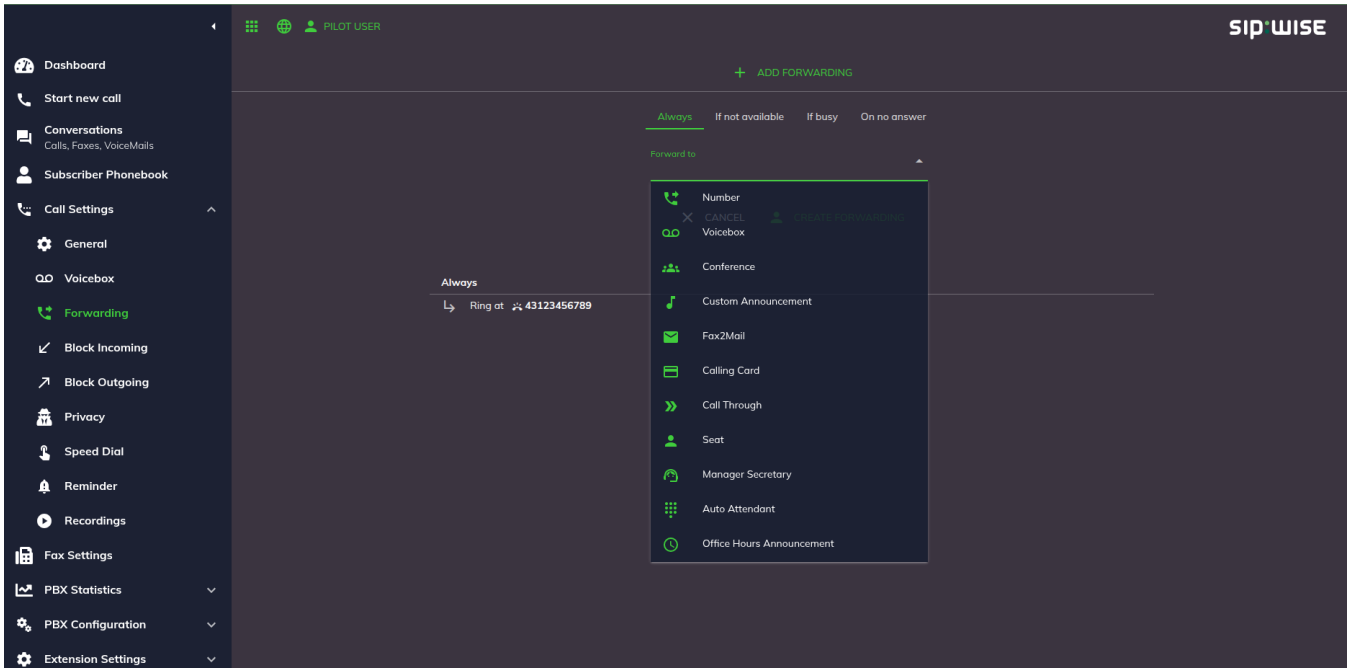


Figure 22. Choosing where a call goes

You're not limited to a single destination per rule: a rule can ring one destination for a set number of seconds, and if nobody answers there, automatically move on to a second one — for instance, ringing your mobile number for a minute before falling back to a conference room or your voicemail.

Forwarding Only in Certain Situations

Beyond the four basic situations, a **Condition** can narrow a rule down even further — for instance, only forwarding calls that come from a specific list of numbers, only on a particular date, or only outside your usual working hours.

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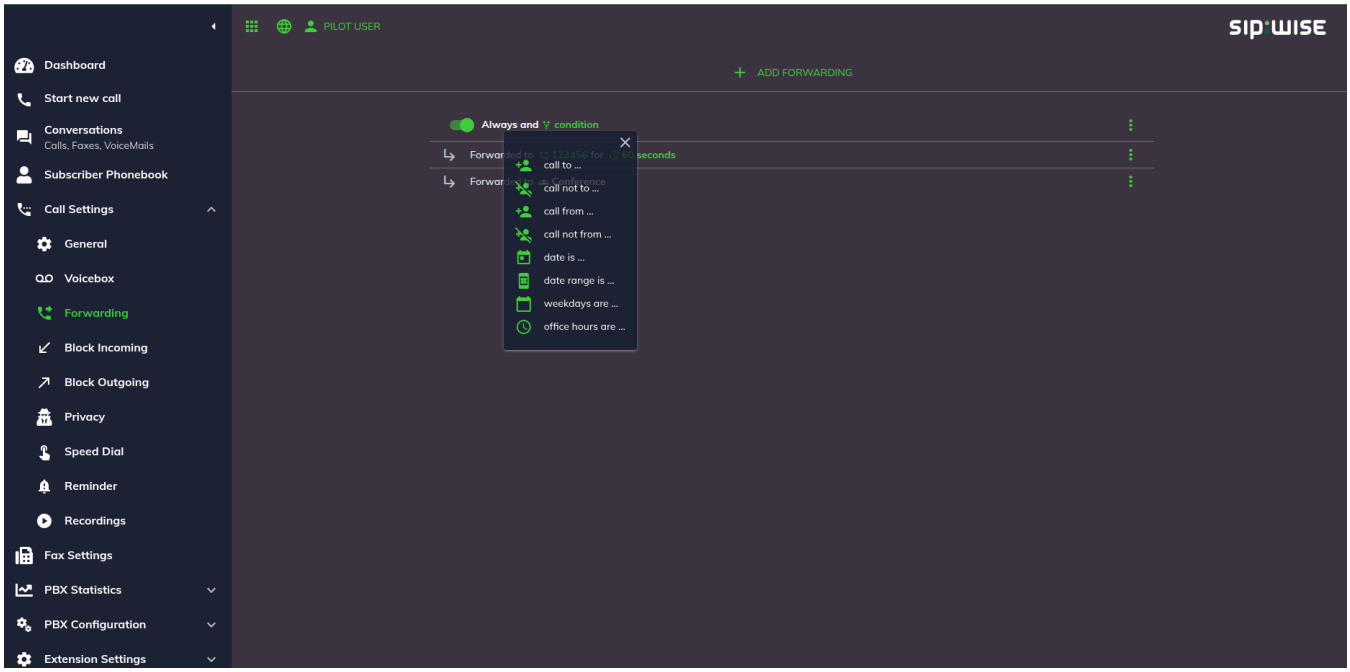


Figure 23. Adding a condition to a rule

Conditions can also be combined — a single rule might apply only when the call comes from one of a chosen list of numbers **and** only on a specific date — which makes it possible to set up quite precise forwarding behavior without needing more than one rule.

3.4.4. Blocking Numbers

Blocking Incoming Calls

The **Block Incoming** tab lets you control who can reach you. You can switch on **All anonymous incoming calls are blocked** to reject any call that arrives without caller-ID information at all. Below that, a choice lets you pick the style of blocking that suits you: either block only the specific numbers you list, or — the opposite approach — allow only the numbers you list and block everyone else.

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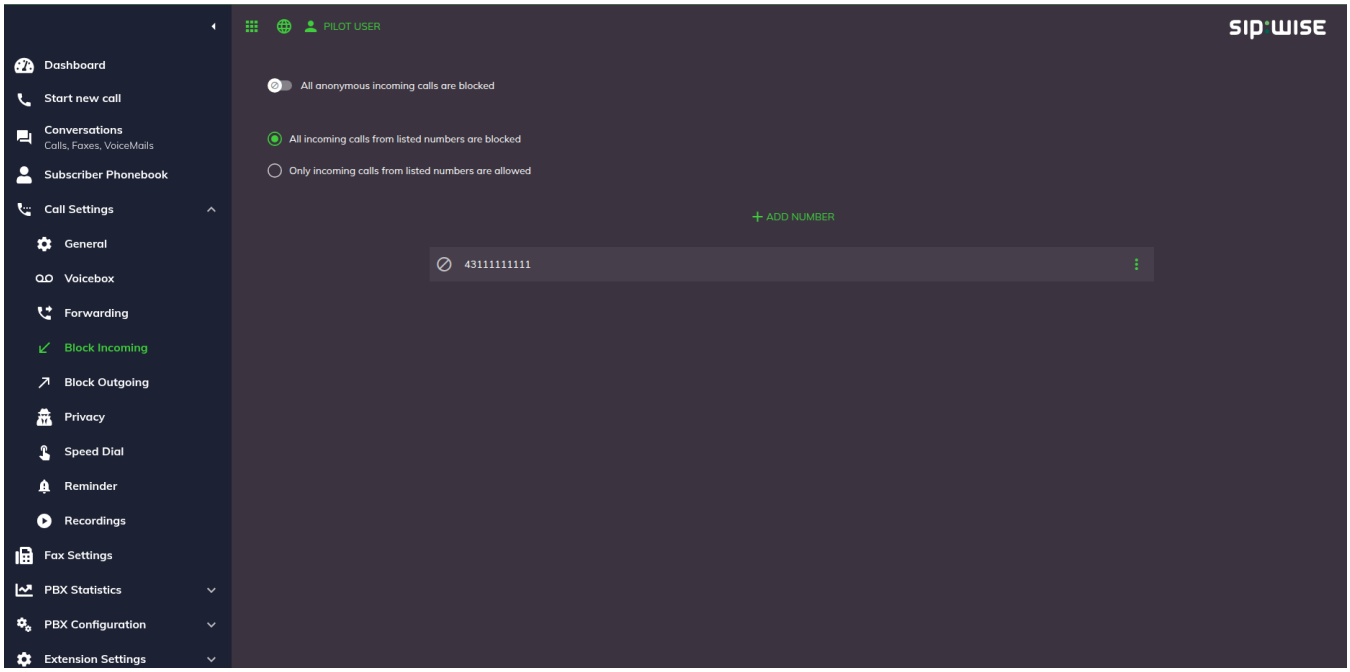


Figure 24. Blocking incoming calls

Whichever style you choose, **Add Number** is how you build up your list.

Blocking Outgoing Calls

The **Block Outgoing** tab works the same way, but for calls you make rather than calls you receive: you can block specific numbers, or restrict yourself to only being able to call the numbers on your list.

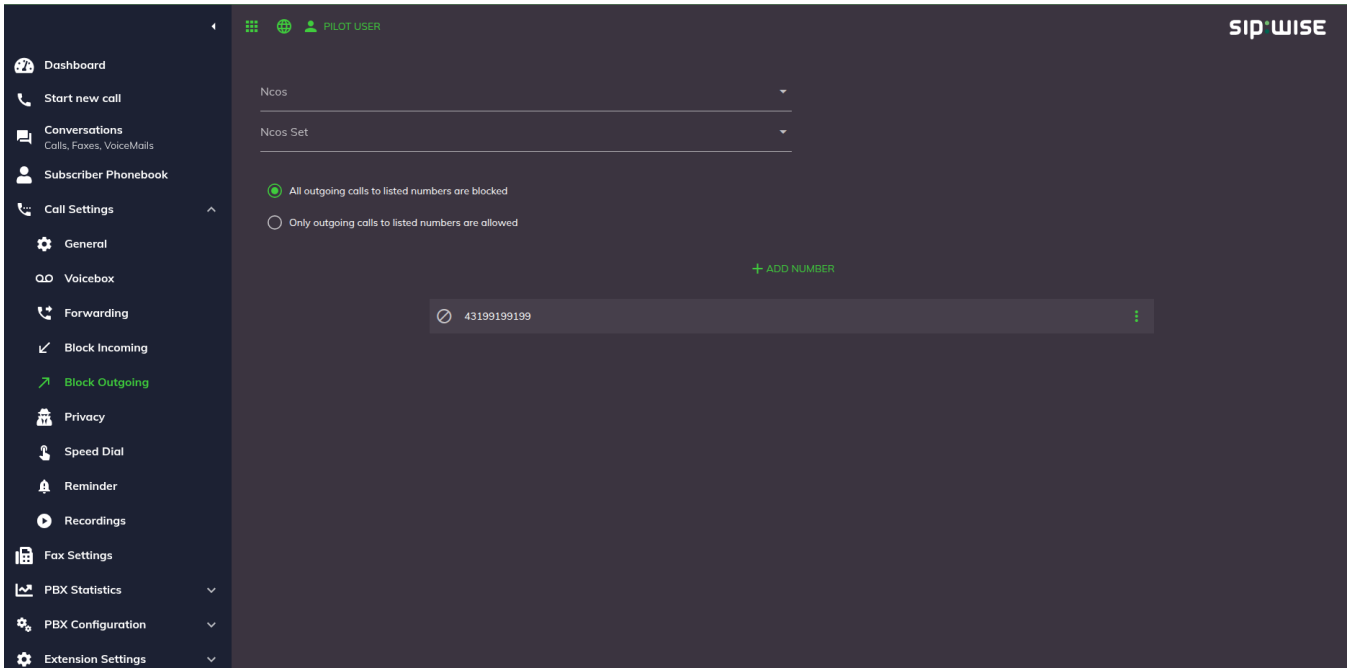


Figure 25. Blocking outgoing calls

This page may also show **Ncos** options. Ncos stands for "Number Class of Service" — it's simply a way your operator can group whole categories of destinations together, such as international numbers or premium-rate numbers, so that an entire category can be allowed or blocked at once instead of you

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having to list every number individually. If your operator hasn't set this up for your account, you can simply ignore it and manage your outgoing block list one number at a time.

3.4.5. Hiding Your Caller ID

The **Privacy** tab lets you decide whether the person you're calling can see your number. Turning on **Hide your number to the callee** makes your calls appear as "Anonymous" to people outside your phone system, much like the caller-ID blocking feature offered by many mobile carriers. A second, separate switch **Hide number to the callee within own PBX** lets you hide your number also from colleagues within your own company phone system.

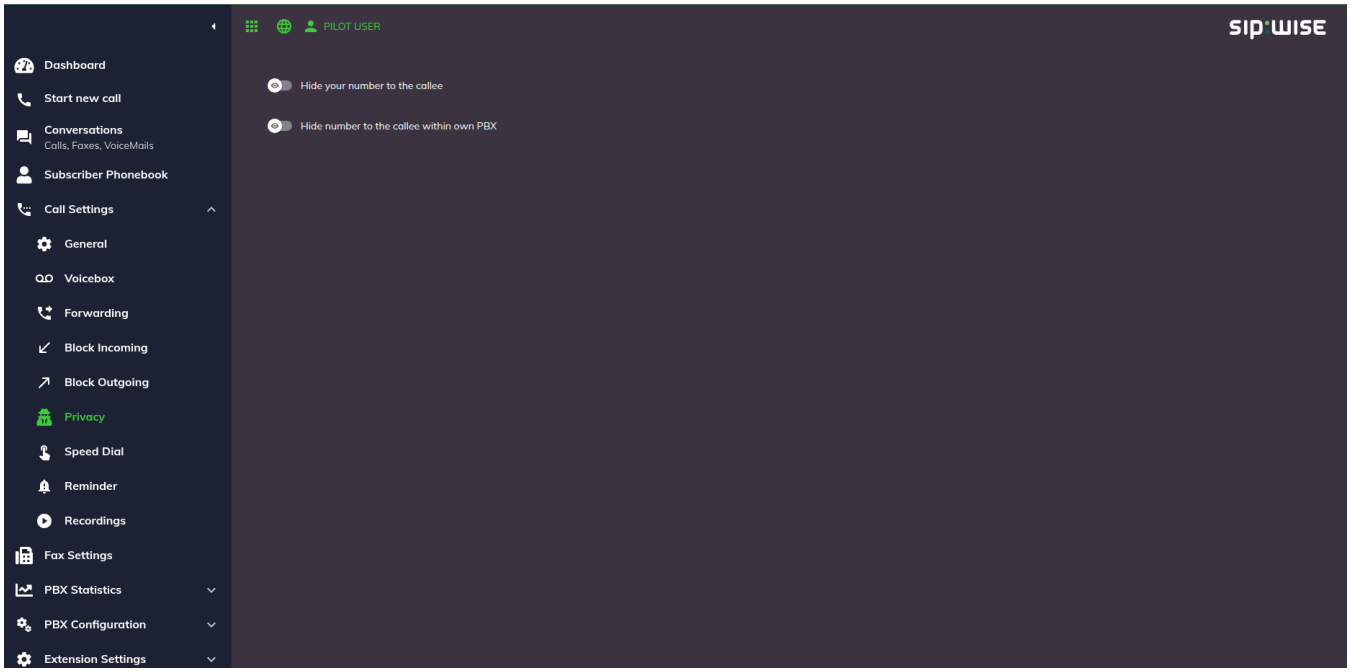


Figure 26. Hiding your caller ID

Keep in mind that hiding your number doesn't guarantee every phone system will honor the request — some emergency services and toll-free numbers are required by law to see the real caller ID regardless of this setting.

3.4.6. Speed Dial

Dialing Shortcuts

Speed dial lets you reach a number you call often by dialing a short code from your phone instead of the full number. Each entry in the **Speed Dial** list shows the code and the number it dials — for example, dialing `*0` might ring your partner's mobile number directly.

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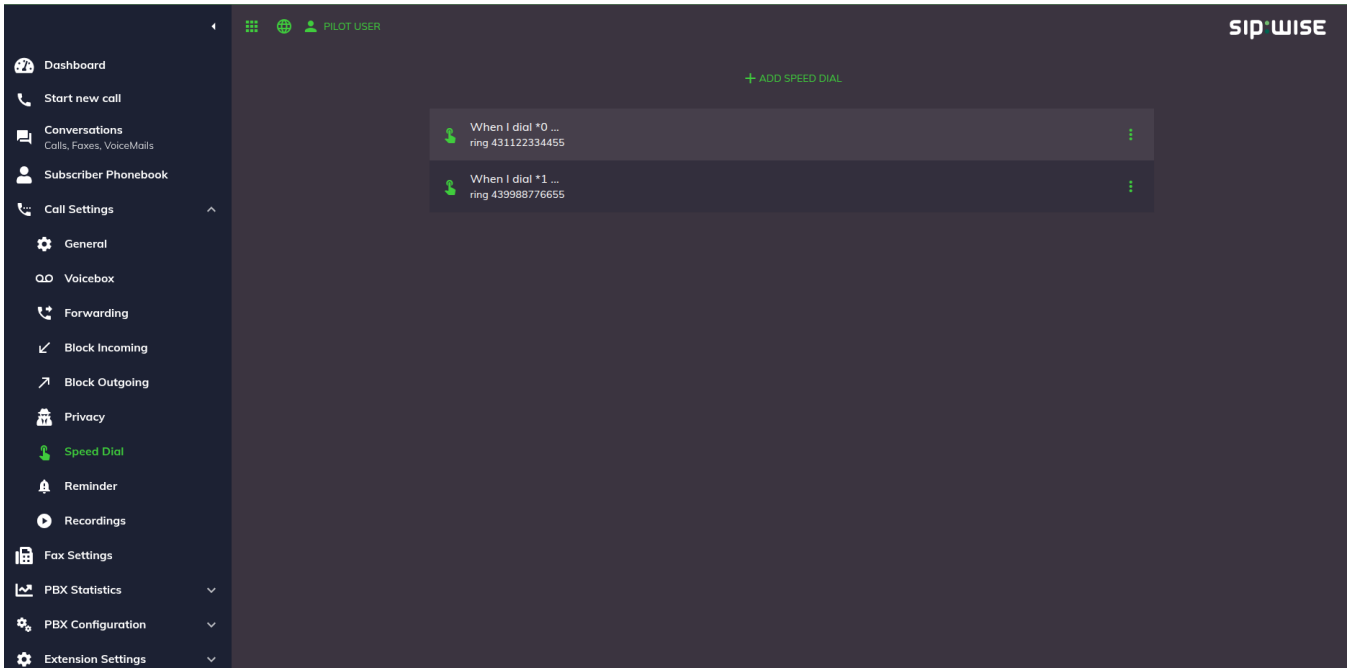


Figure 27. Your speed-dial shortcuts

Adding a Shortcut

Select **Add Speed Dial**, then choose which code should trigger it and which number it should dial. Only a limited set of codes is available (from 0 to 9), since they have to stay short enough to be quick to dial and not clash with other features of your phone system.

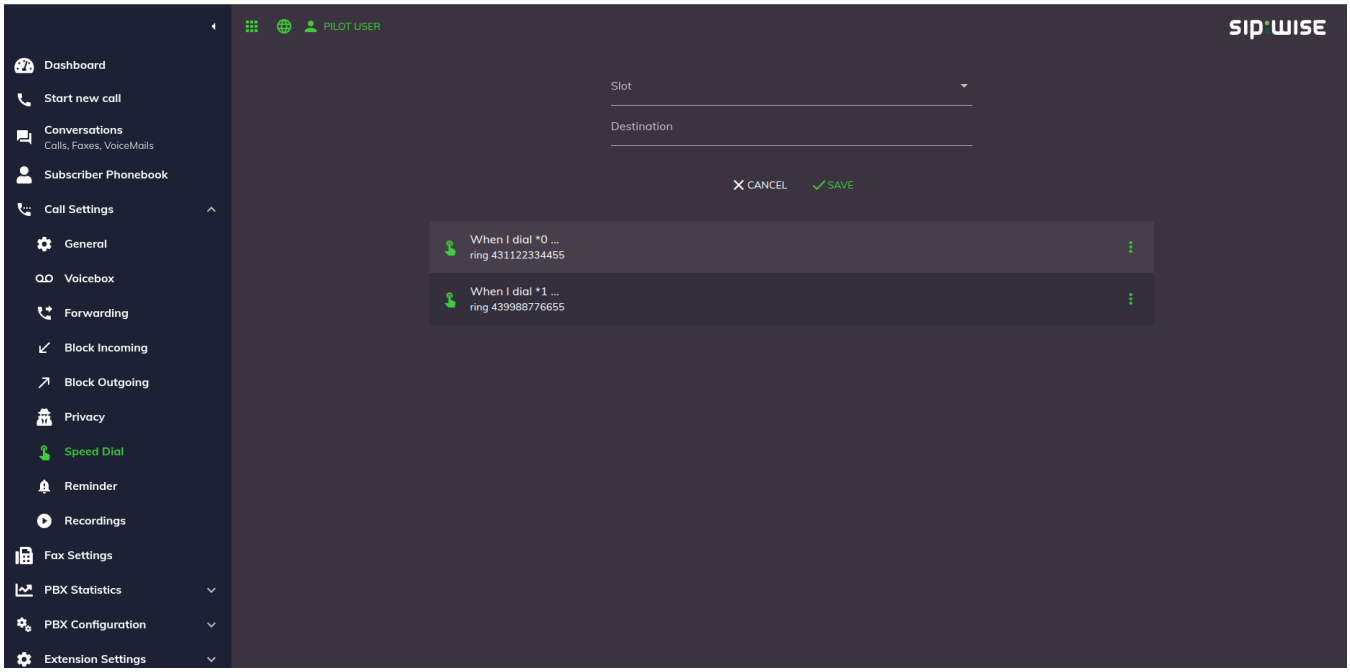


Figure 28. Adding a new shortcut

3.4.7. Reminder Calls

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Setting a Wake-Up or Reminder Call

The **Reminder** tab turns your phone into a simple alarm clock: at the time you choose, it rings you, just like a hotel wake-up call.

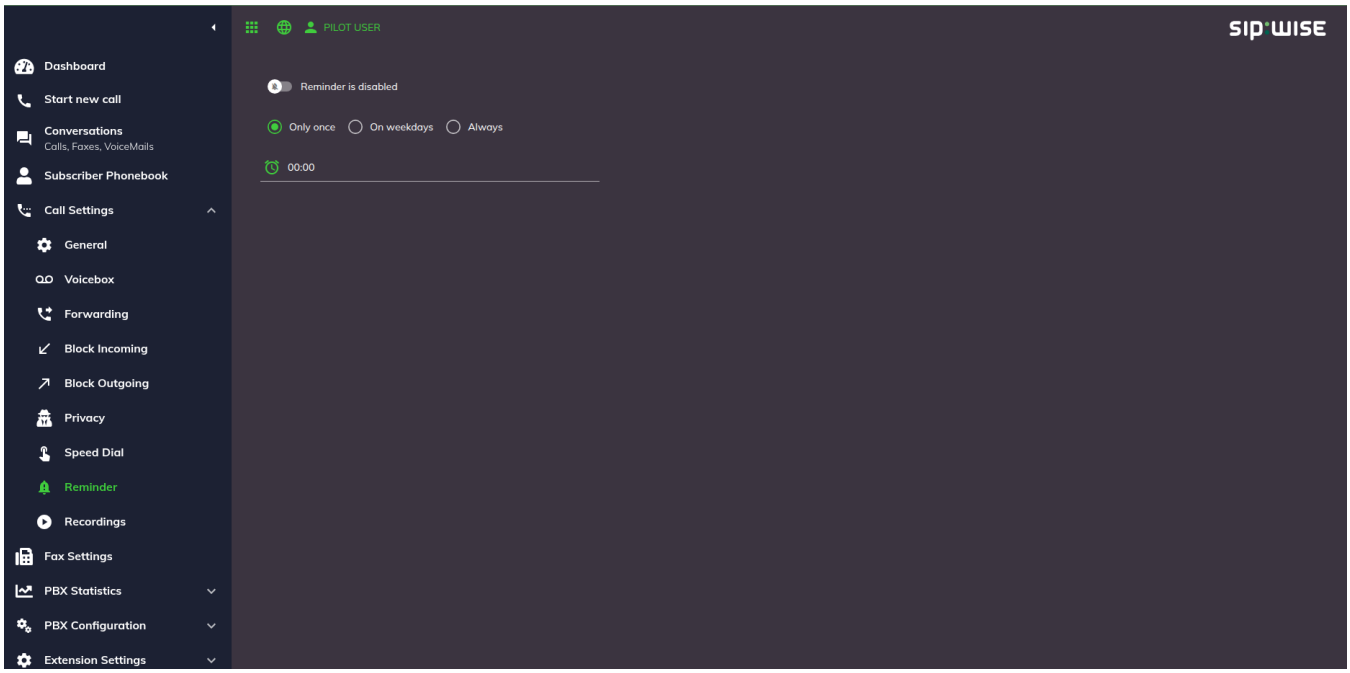


Figure 29. Setting up a reminder call

Once you switch the feature on, you can choose whether it should ring you **only once**, **every weekday**, or **always** (every day), and pick the time using a simple clock.

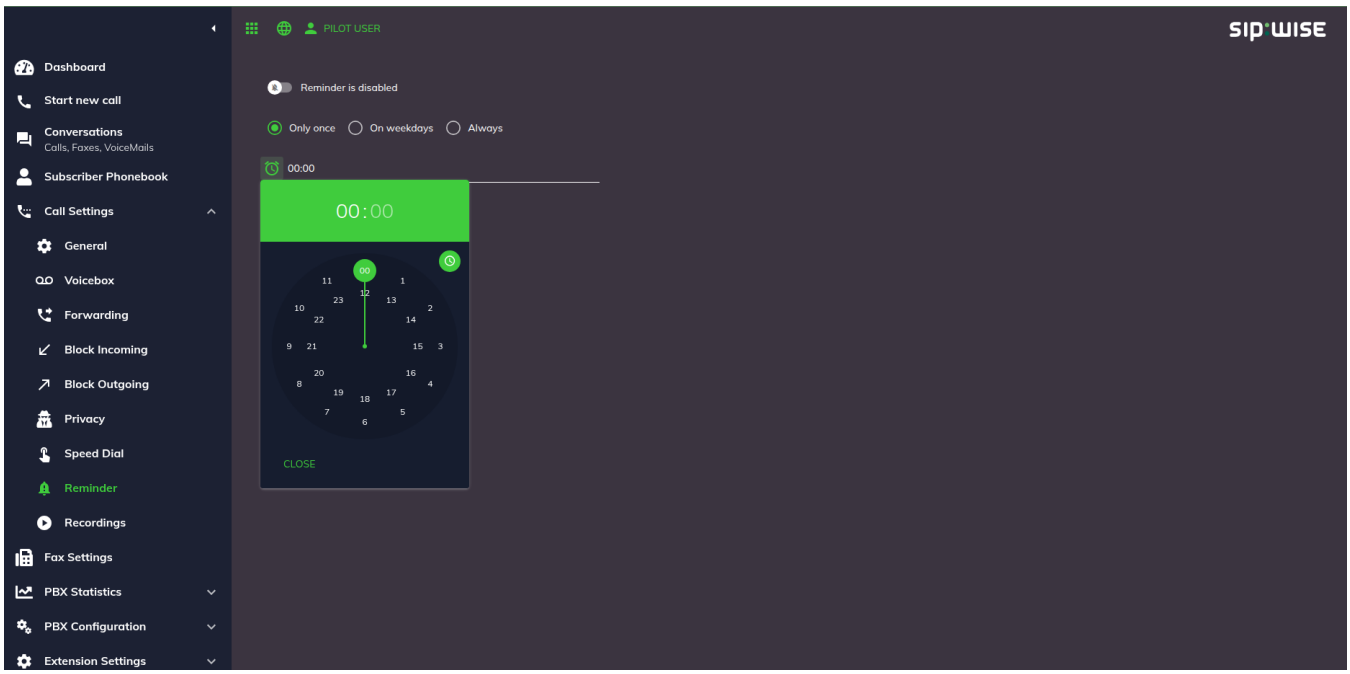


Figure 30. Choosing the reminder time

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3.4.8. Call Recordings

Listening Back to Recorded Calls

If your operator has enabled call recording for your line, recordings appear under the **Recordings** tab, listed by date and time together with the caller and callee involved, so you can find and listen back to a specific call.

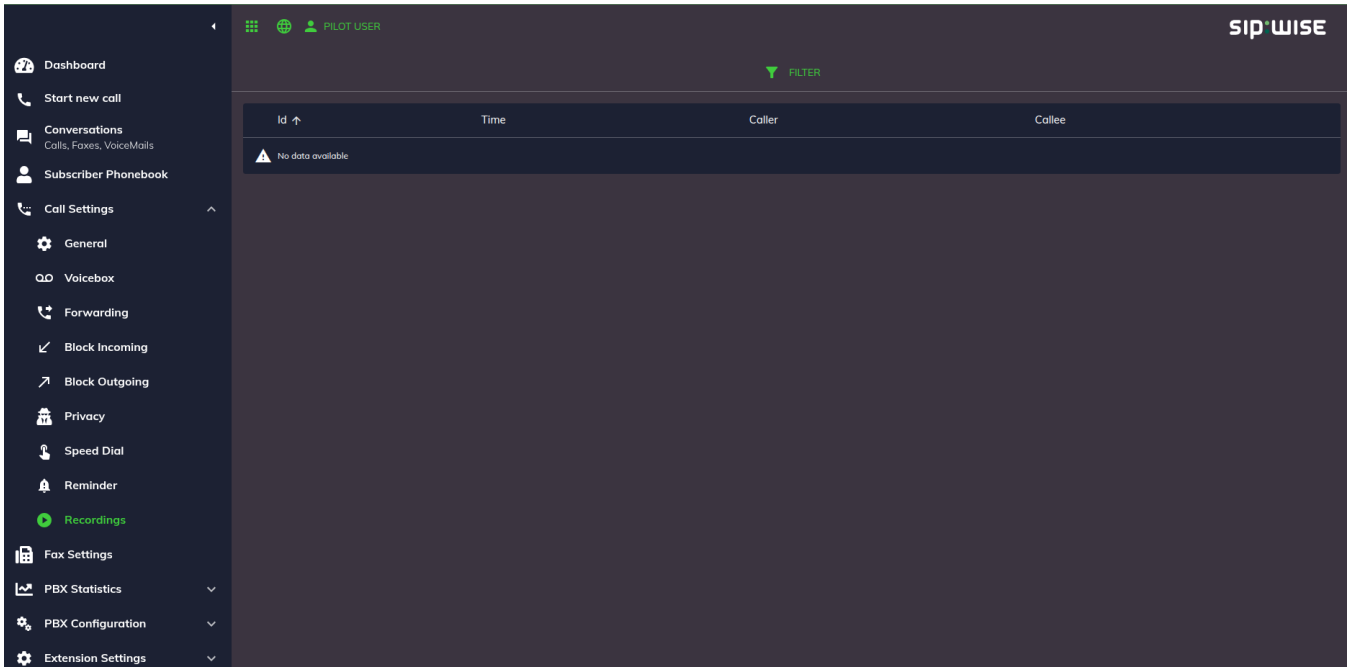


Figure 31. Call recordings

The **Filter** button lets you narrow the list down, which becomes useful once you have more recordings than fit comfortably on one page.

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3.5. Registered Devices

3.5.1. What's Currently Connected to Your Line

Registered Devices lists every phone, app or piece of software currently signed in and able to receive calls on your number. Each entry shows what kind of device or app it is, and how long its connection is valid for before it needs to reconnect on its own — this happens automatically in the background, so you don't normally need to do anything about it.

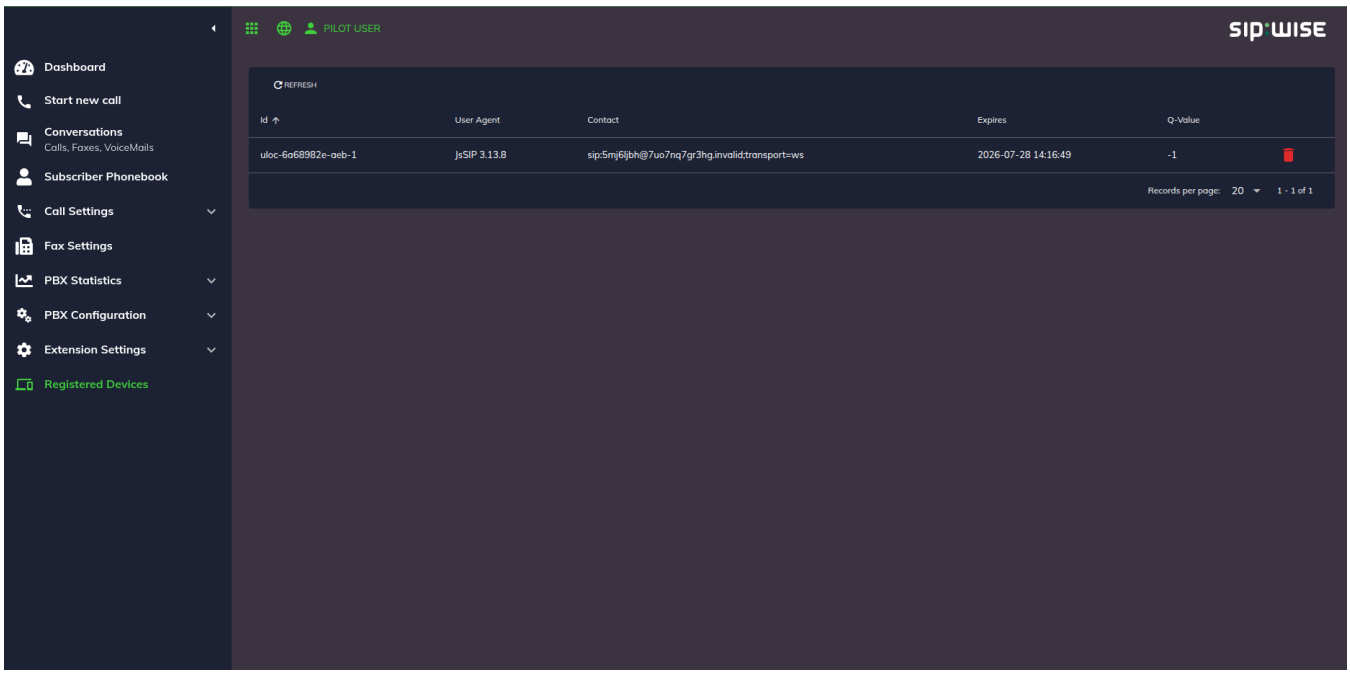


Figure 32. Devices connected to your line

If you see a device here that you don't recognize, or one you've stopped using — an old phone, for instance — you can remove it from this list. This is also a useful first stop if calls to your number aren't reaching you: checking that the device you expect to ring is actually listed here can quickly tell you whether the problem is with the phone system or with the device itself.

NOTE If your account administers the company's phone system, this page lists every device registered across the whole company, not just your own — including your colleagues'.

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3.6. Account Settings

3.6.1. Getting to Your Account Settings

Selecting your name in the top-right corner of any page opens a small menu with your phone numbers, **Settings**, and the option to sign out.

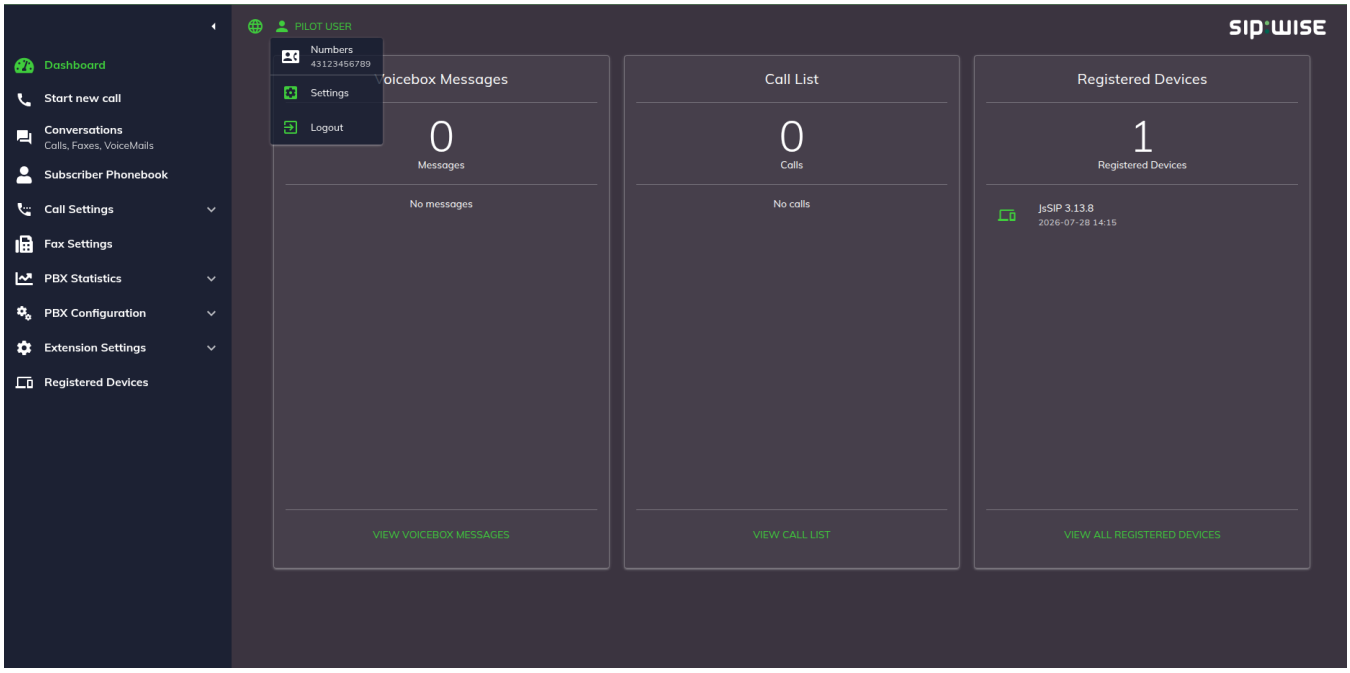


Figure 33. Opening your account settings

The Settings page shown from there holds two separate passwords, which is worth understanding clearly: your **web password** is what you type in on the sign-in page to reach this portal, while your **SIP password** is a separate, usually longer code that your physical phone or softphone app uses behind the scenes to register with the phone system and place calls. Changing one never affects the other.

NOTE the **SIP password** is visible and can be modified only by a user that can administer the entire company's phone system.

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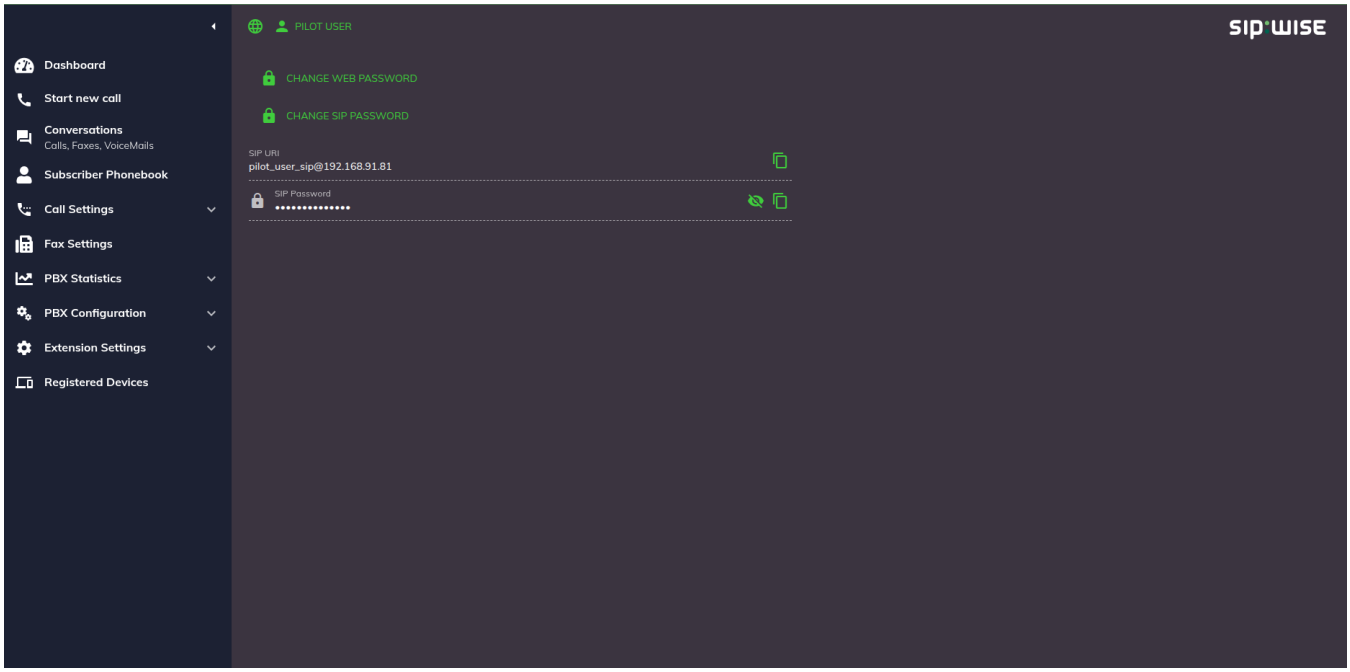


Figure 34. Your account settings

3.6.2. Changing Your Password

Selecting **Change Web Password** opens a small form where you type your new password twice, with a strength indicator to help you judge whether it's strong enough.

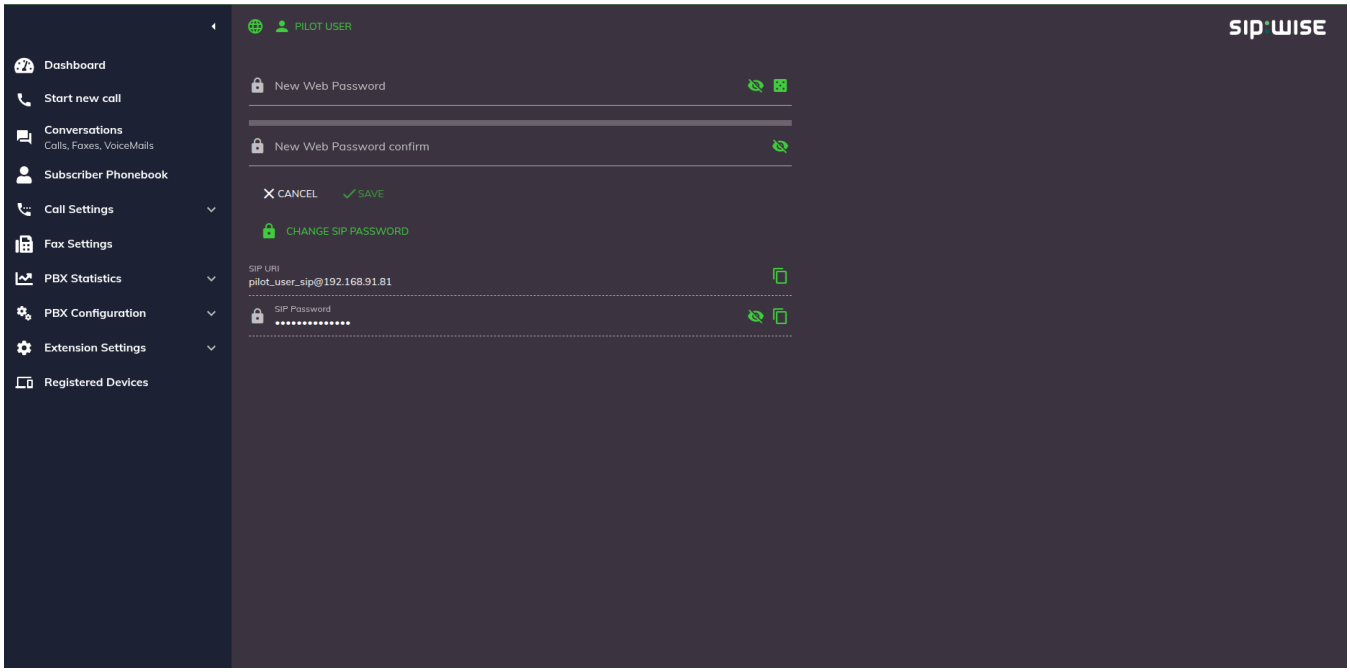


Figure 35. Changing your web password

Change SIP Password works the same way, but only ever needs to be touched if your operator or installer asks you to — for instance, when setting up a new phone, since that password (together with the SIP URI shown on the same page) is what gets entered into the phone itself, not into a web browser.

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Chapter 4. Administrator Settings

NOTE All the following features requires the **CloudPBX** license installed on the NGCP system.

4.1. Administering Your Company's Phone System

4.1.1. Is This Part for You?

Everything up to this point in the handbook applies to any subscriber. From here on, this handbook switches to a different audience: accounts that don't just manage a single phone line, but administer an entire company's phone system — its extensions, shared contacts, and company-wide call rules.

You can tell straight away whether this applies to your account: if your portal's menu includes two extra entries, **PBX Statistics** and **PBX Configuration**, alongside everything described so far, then this part of the handbook is written for you. If you don't see them, none of the following chapters apply to your account, and you can stop reading here — though you're welcome to read on out of curiosity.

4.1.2. What's Different Here

The features in the rest of this handbook are no longer about your own, personal line — they're company-wide. A rule you set up in Company Call Rules, for instance, applies to every extension in the company, not just yours; the phonebook covered in Company Phonebook is shared by everyone, not private to you. Think of this part of the handbook as the toolbox for whoever is responsible for keeping the company's phone system organized — typically an office manager, a receptionist, or whoever set the system up in the first place.

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