

Create a User

Scope:

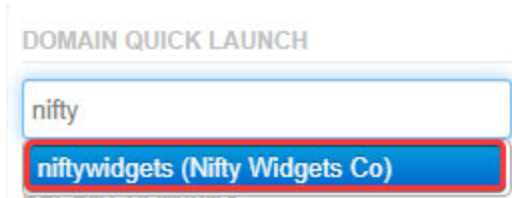
The following steps will allow you to create a user within the hosted PBX. The user can be for a person, call queue, IVR/Auto Attendant, Ring Group or voicemail box.

Requirements:

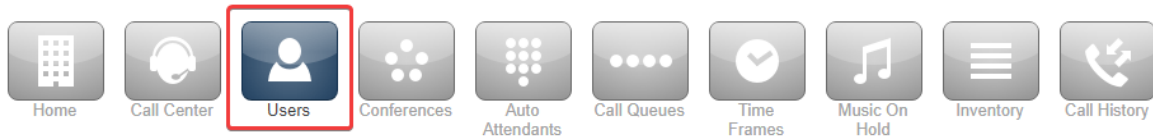
- Customer's domain
- Extension number to be used
- Name of user
- Email address (optional)

Create User

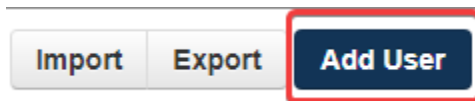
1. Using any browser log into the Dashboard.
2. Click on Manage PBX
3. Under Domain Quick Launch enter the customer's domain and click on it.



4. Click on **Users**



5. Click on **Add User**



6. Fill out the following form:

- **First Name** - First name of person or resource
- **Last Name** - Last name of person or resource (Optional)
- **Extension** - Extension number for user. This cannot be changed later. Make sure you follow the numbering plan for the client and follow the [Reserved Number Space](#)
- **Department** - Optional
- **Email Addresses** - Email addresses that will receive voicemail notifications if applicable
- **User's Scope** - Select from below
 - **No Portal** - Will not have portal access
 - **Simple User** - For residential users
 - **Basic User** - Default for most users

- **Call Center Agent** - Has call center facilities on dashboard. Requires additional billing to client.
- **Call Center Supervisor** - Has call center supervisor facilities on dashboard. Requires additional billing to client.
- **Office Manager** - Used for customer administrator. Has additional permissions. No additional billing

7. **Caller ID**

8. **Enable Voicemail** - Check if customer will need voicemail. Leave unchecked for resource extensions.

9. **Add Phone Extension** - Only check if this extension will have a handset or softphone associated. This is a billable event.

10. **New Password** - Enter a password for the user (optional)

11. **Confirm Password** - Re enter password

12. **Voicemail PIN:** At least 4 digits, numbers only

13. Click **Add User** once completed

Add a User



First Name	<input type="text" value="Demo"/>
Last Name	<input type="text" value="User"/>
Extension	<input type="text" value="3056"/> Note: Cannot be changed
Department	<input type="text"/>
Email Address(es)	<input type="text" value="demo.user@niftywidgets.cp,"/>
User's Scope	<input type="text" value="Basic User"/> ▼
	<input checked="" type="checkbox"/> Enable Voicemail
	<input checked="" type="checkbox"/> Add Phone Extension

New password and voicemail PIN are both optional.

New Password	<input type="text"/>
	Minimum length of 8 characters, minimum of 1 capital letter(s), minimum of 1 number(s).
Confirm Password	<input type="text"/>
Voicemail PIN	<input type="text" value="8590"/>
	Minimum length of 4 characters.

Cancel

Add User

Notes

Upon creating a user you might notice certain system tags on the Users panel. Their definitions are below

New: This indicates that the user has an email, but no PIN or portal password.

Setup Required: This indicates that the user does not have an email address

Password Required: This indicates that the user does not have a portal password set.

Conclusion

The new user will be displayed in the Users list. You can click on the user's name to make any necessary adjustments such as configuring answering rules or adding phones.

