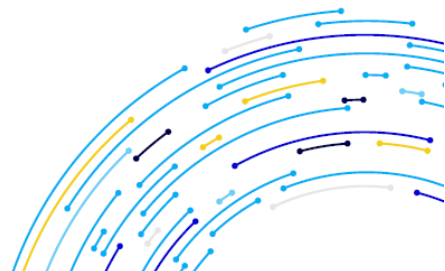




SkyVoice Admin Portal

Getting Started Guide for Administrators



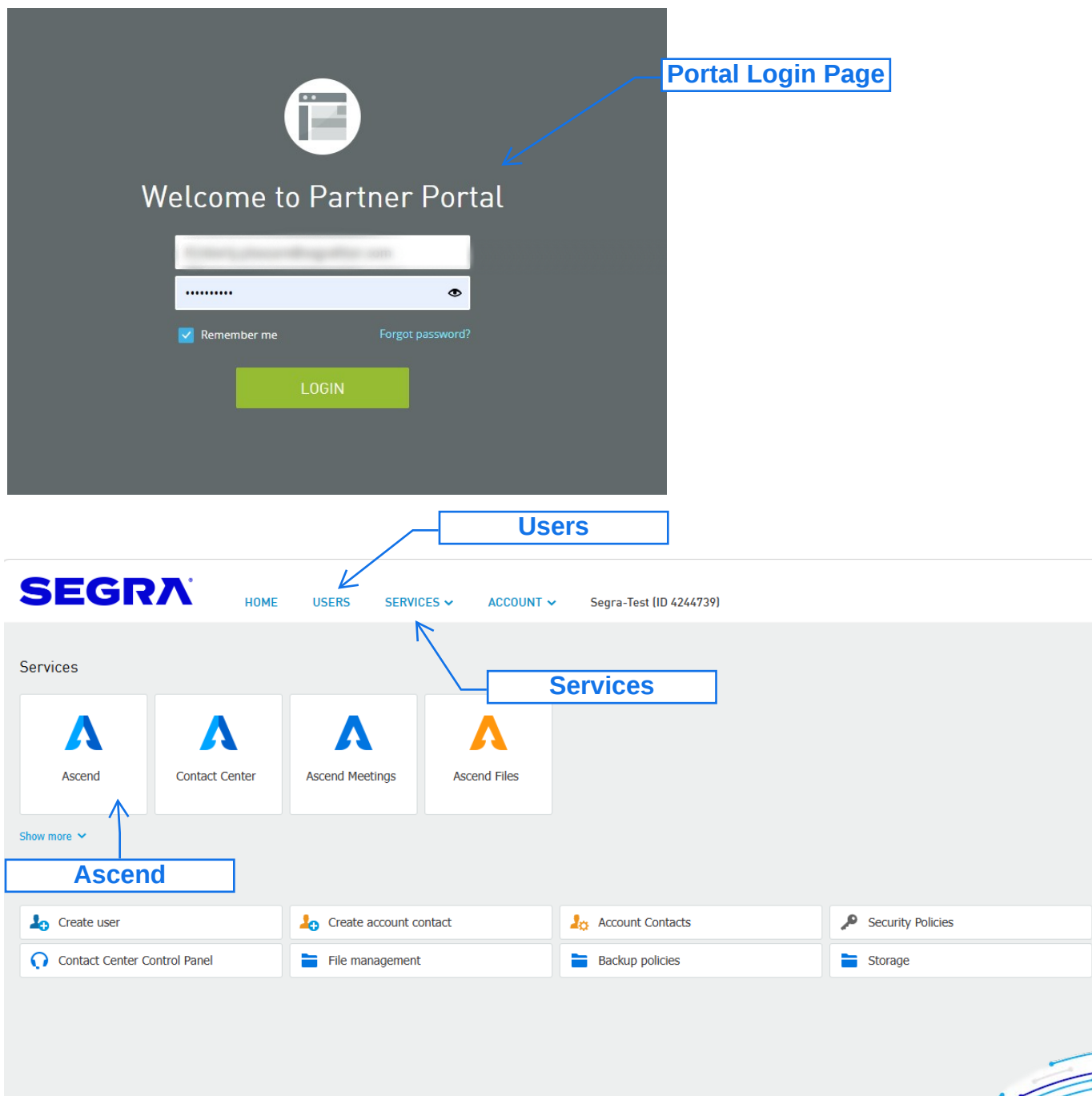
Getting Started

It's important to understand as many basic functions as possible, as well as the locations of the buttons that are most relevant. This section will help bring these to light.

Access the Partner Portal

1. Go to: <https://cp.serverdata.net/Portal/User/Login> (or the Partner-specific login if provided).
2. Log in with your **Credentials**.
3. Navigate to **Services > Ascend** for phone system management.

Note: Use Chrome or Edge for best results. Most admin tasks are under **Services > Ascend > Users, Auto Attendant, etc.**



To Change a User's Name or Email Address

- Go to **Users**.
- Click the **display name or email** of the existing user.
- Edit the email, first name, last name, or display name in the user profile.
- Save changes. (This updates caller ID and directory listings.)

To Reset Ascend desktop/mobile app or web access Password

- Go to **Users**.
- Click **reset password**.
- Reset or generate a new password for the Ascend desktop/mobile app or web access.
- Provide the temporary password to the user (they can change it upon first login).

Note: You can edit user password settings, set user permissions, and disable the user.

The screenshot shows the SEGRA Users interface. A box labeled "Users" points to the "USERS" tab in the top navigation bar. Below the navigation bar, the "User Settings" section is visible. A box labeled "Display Name" points to the "Kimberly Teams" user name. A box labeled "Reset Password" points to the "Reset password" link in the right-hand menu. A box labeled "Password Settings" points to the "Edit user password settings" link. A box labeled "User Permissions" points to the "Set user permissions" link. A box labeled "User Info" points to the "Edit user info" link. A box labeled "Disable User" points to the "Disable user" link. The left sidebar shows "User Info" and "Ascend" options.

To Change Call Forwarding & DND Options

- Go to **Services > Ascend > Users** → Click the user's display name.
- Select the **Call Forwarding** tab.
- Configure profiles for:
 - Always forward, Busy, No Answer — set destination numbers.
 - Presence-based rules (e.g., DND, Out of Office).
 - Enable/disable **Do Not Disturb (DND)** or set default behaviors for presence statuses.
- Save. (You can also manage forwarding for Auto Attendant or Hunt Groups if needed.)

The screenshot shows the SEGRA Call Forwarding settings page. A box labeled "Create Profile" points to the "+ Create profile" button. A box labeled "Call Forwarding" points to the "Call forwarding" tab in the left sidebar. The main content area shows "Call forwarding profiles" with a table of profiles. The table has columns for "Profile name" and "Active". The first profile is "Default: Silent mode profile" and is active. The second profile is "Default" and is not active. The "Active" column has a toggle switch and a dropdown menu.

Adding / Managing Voicemail to Email

- Go to **Services > Ascend > Users** → Click the user's display name → **Voicemail** tab.

Main Voicemail Settings (top section):

- Check/uncheck **Enable voicemail**.
- Select **Greeting** (Default.mp3 or custom uploaded greeting).
- Reset **Voicemail PIN** (see section 5 above).
- Set **Operator number** (if needed; often left as "Not setup").
- Check/uncheck **Autodelete voicemail after X days** (e.g., 90 days).
- Check/uncheck **Voicemail transcription**.

Voicemail Notifications (lower section):

- Check **Email for voicemail** and enter/add the email address (e.g., user@domain.com).
- Check **Include voicemail transcription** (if available in plan).
- Check **Include voicemail file** (attaches audio file, e.g., .mp3 or .wav).
- Check **Delete voicemails on server** (removes from server after email notification; use cautiously).
- Check **Mark voicemail as read after notification sent**.
- Check **Send SMS notification** and enter the phone number (if SMS alerts are included).

Click **Save changes** at the bottom.

User Settings

[To users](#)

Kimberly Teams [kimberly@segra.com](#)

Voicemail Tab

Voicemail Settings

Use this page to manage voicemail settings.

☒ Enable voicemail

To manage this voicemail box via a phone on the system:
Dial *111 and press # when you hear the greeting
Dial 111# and enter the PIN and press #

Greeting [Default.mp3](#)

Voicemail PIN [Reset](#)

Operator number [Not setup](#)

☐ Autodelete voicemail after days

☒ Voicemail transcription

Voicemail Notifications

Choose how you would like to receive notice of new voicemail messages.

☒ Email for voicemail

☒ Include voicemail transcription

☐ Include voicemail file

☐ Delete voicemails on server

☐ Mark voicemail as read after notification sent

☐ Send SMS notification

[Save changes](#)

Configuring Programmable Line Keys on a Device (Speed Dial, BLF, and Other Options)

- Go to **Services > Devices** → Click the device's display name.
- Click **Line Keys**.
- Select the line key to configure (e.g., Set line key #2, Button 3, Button 4, etc.). Note: The first line key is usually reserved for the device's primary extension.

Key Configuration Fields:

Action (choose the desired function of the key):

- **Speed Dial** — Quick one-button access to an internal user/extension or external phone number.
- **Busy Lamp Field (BLF)** — Monitors another user's status (idle, ringing, busy). LED lights up accordingly; pressing the key often speed-dials the monitored user. Ideal for team monitoring or reception.
- **Hunt Group Login/Logout** — Allows quick login or logout from a hunt group.
- **Advanced Hunt Group Login/Logout** — For more complex hunt group scenarios.
- **Remote-line Key** — Monitors or controls a remote line.
- **Line Key Alias** — Creates an alternate label or behavior for a line.
- **Monitor Park Slot** — Monitors a call park location.
- **Call Pickup** — Picks up a ringing call from another extension.
- **Access Code** — Dials a predefined access code.
- **Park** — Parks the current call for pickup elsewhere.
- **Record** — Starts/stops call recording (if enabled in the plan).
- **Answer Page** — Answers a page/intercom.
- **Night Mode** — Toggles system night mode (if applicable).
- Other available options may include: User's Voicemail, Auto Attendant, Hunt Group, Paging Group, Custom.

Object — Select the type (e.g., User, User's Voicemail, Auto Attendant, Hunt Group, Phone Number, Paging Group, Custom).

- **User** (or corresponding field) — Enter or select the specific extension, user, or value.

Display on phone — Enter a short label that appears on the phone screen (e.g., "John Sales" or "BLF – Jane").

Click **Save changes**.

The phone usually auto-provisions; reboot if the new key does not appear immediately.).

SEGRA HOME USERS SERVICES ACCOUNT MS-Voice-Lab-E (ID 4460051)

Ascend

General
Subscription
Users
Phone Numbers
Auto Attendant
Groups
Contact Center
Archiving
Locations
Devices
Resources & Utilities

← To devices

Polycom E350 **Actions**

Set line key # 2 X

Choose the desired function of the key below.

Action: Speed Dial
Provides one-button access to another location within your organization or an external phone number

Object: User

User: Select user

Display on phone ⓘ

Save changes **Save Changes**

Managing Hunt Groups (Existing Groups Only)

- Go to **Groups** (or **Services > Ascend > Groups** / Hunt Groups section).
- Select the existing hunt group.

Common adjustments:

General:

- Edit **Name** (if needed).
- View or confirm **Extension** and **Phone number** (cannot add new numbers).
- Change **Ringing order** (e.g., Ring All — note: Ring All supports up to 35 agents max).
- Set **Time Zone** and **Location**.
- Adjust **Max callers on hold**, **Agent wrap-up time**, **Basic Hunt group timeout**, and related checkboxes (e.g., Route group calls to an agent while on a personal call, Enable call waiting for agents).

Menu:

- Configure menu options, dialing behaviors, or key mappings for callers reaching the hunt group.

Greetings:

- Upload or change greetings (e.g., Music on Hold / Ringing tone, ringback tone, or custom announcements).
- Select default or uploaded audio files for the hunt group.

Agents:

- Add/remove existing users/agents from the group.
- Adjust agent participation or login/logout settings.

Call recordings:

- Enable/disable call recording for the hunt group (if already included in your plan; do not enable new paid recording features).

Voicemails:

- Configure voicemail options for the hunt group (e.g., routing unanswered calls to a shared voicemail box).

Voicemail settings:

- Fine-tune notifications, greetings, transcription, or email delivery for hunt group voicemails.

Reports:

- View hunt group-specific reports (read-only access to metrics like call volume, agent performance, etc.).

Click **Save changes** after adjustments. Test by calling the hunt group extension or phone number.

Ascend

General
Subscription

[To groups](#)

GNVL Basic Hunt Group

Groups Tab

Phone Numbers
Auto Attendant
Groups
Contact Center
Archiving
Locations
Devices
Resources & Utilities
External Contacts
Settings
Call Blocking

Group Settings

General

Menu

Greetings

Agents

Call recordings

Voicemails

Voicemail settings

Reports

General

General settings help determine how callers may reach your basic hunt group, how it will direct calls to your Agents, where voicemail notifications will be recorded or transcribed.

For information about usage and overage charges, please visit the [Knowledge Base](#).

Try the new Advanced Hunt Group capabilities.
Gain insights, access new features and reports, improve the efficiency of your teams.

[Upgrade to Advanced Hunt Group](#)

Type: Basic Hunt ⓘ

Name: GNVL Basic Hunt Group

Extension ⓘ: 1011 ✕

+ [Assign phone number](#)

Phone number ⓘ

Ringing order ⓘ: Ring All
Groups with the "Ring all" order can have max 35 agents

Time Zone: (UTC-04:00) Eastern Time (US & Canada) ⓘ

To Upload / Manage Auto Attendant Recording / Greeting & Settings

- Go to **Auto Attendant**.
- Select the existing Auto Attendant.

Common adjustments:

The main screen shows tabs for configuration:

Business hours (primary tab shown):

- View or edit weekly schedules in the calendar view (Weekly, 2026 example).
- Existing menus appear as colored blocks (e.g., “Working hours 08:00 AM – 06:00 PM, weekdays” and “After hours 24x7”).
- Drag menus to adjust priority/order (higher menus take priority in case of schedule conflicts).
- Use **12 hours** or **24 hours** view toggles.
- Click + **Create Business hours** to add a new schedule block using existing menus (no new creation of billable items).

Events:

- Configure special/one-time events or holiday schedules that override regular business hours.

Receptionists:

- Assign or adjust receptionist routing options (e.g., live answer or fallback behaviors) using existing resources.

Settings (gear icon):

- Additional global options for the Auto Attendant.

Common non-billable adjustments across tabs:

- **Greetings:** Upload new audio files or record via system prompts for main greeting, business hours, after hours, etc.
- **Menus/Prompts:** Edit dial-by-name, dial-by-extension, or key mappings (e.g., press 1 for Sales).
- **Routing:** Adjust where calls go (to existing users, hunt groups, voicemail, or other menus) based on time of day or menu selection.
- **Night Mode / After Hours:** Modify behavior for times outside business hours.

Click **Save changes** (or apply schedule updates) and test by calling the Auto Attendant number at different times.

Tip: Business hours menus repeat weekly. Use the calendar to visualize and reorder priority. After hours are any times not covered by business hours menus. Focus on reordering, greetings, and routing of existing elements.

The screenshot shows the SEGRA Auto Attendant configuration interface. The top navigation bar includes the SEGRA logo, an 'Auto Attendant Tab' label, an 'ACCOUNT' dropdown, and the user ID 'Segra-Test (ID 4244739)'. The main interface has a left sidebar with a menu: General, Subscription, Users, Phone Numbers, Auto Attendant (selected), Contact Center, Archiving, Locations, Devices, Resources & Utilities, External Contacts, Settings, Call Blocking, and Quality. The main content area has a 'Main' section with tabs for 'Business hours', 'Events', and 'Receptionists'. The 'Business hours' tab is active, showing a list of business hours menus: 'Working hours 08:00 AM - 06:00 PM, weekdays' and 'After hours 24x7'. Below this is a 'Weekly, 2026' calendar view with a toggle for '12 hours' or '24 hours'. The calendar shows a grid of time slots from 07:00 AM to 02:00 PM for each day of the week. Annotations with arrows point to various elements: 'Auto Attendant Tab' points to the top bar; 'Settings' points to the gear icon in the top right; 'Receptionists' points to the 'Receptionists' tab; 'Business Hours' points to the 'Business hours' tab; and 'Events' points to the 'Events' tab. A decorative graphic of colorful curved lines is in the bottom right corner.