Blueface
Reseller Support Guide

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A COMCAST **BUSINESS** COMPANY

Contents

Reseller Support Guide

1. Introduction

This guide has been developed to assist Resellers with navigating the UC Portal. In turn it helps Resellers to assist their customers with common questions and issues.

2. UC Portal Basics

A question that some Resellers might be asking is "can I provide support for my customer's Blueface service?" and the answer is Yes! When a Reseller brings a customer onto the UC Portal, the customer is added under the Reseller's Customer List, which provides the Reseller with privileged access to their customer's account.

1. First, log into your Reseller account on the UC Portal at **https://uc-portal.blueface.com/login.**
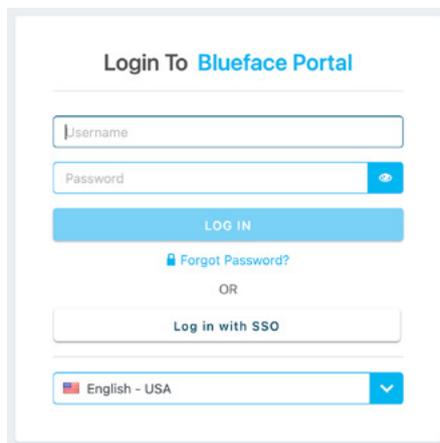
2. Once on the main dashboard, there will be a toolbar on the left side with icons. Select the **People** icon and then select **Customers**.
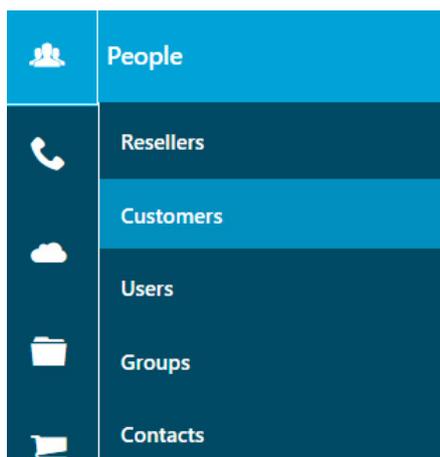
3. This page will show a list of customers that were set up under your Reseller account. This includes the Company Name, Account Number, the Account Holder, Country, and Sign-Up Date of each customer.

4. On the right-side of each customer listing, there are three icons that do the following, starting from left to right:

A) The first icon, called **[Copy Customer ID to Clipboard]**, will copy the customer's UC Portal ID to the clipboard.

B) The second icon, called **[Preview]**, will activate a pop-up that provides a quick overview of the customer's account

C) The third icon, called **[Select the Customer]**, will navigate you to the customer's account.

What kind of support can you provide for your customers? With privileged access to the customer's account, you have the same view as the customer and can assist to resolve many minor issues.

2.1 BILLING SUPPORT

There are a few different ways that resellers can support their customers in relation to billing support. They can advise a customer on how best to update their payment method, they can order hardware, they can process payment with an existing payment method, they can view and download previous invoices and they can view and download the customer's call history.

2.1.1 PAYMENT METHODS

If you are logged into the UC Portal and viewing your customer's account, please select the "i" icon on the left-side menu, which will take you to the **Account Details** page. Once on this page, select the credit card tab called **Payment Methods** that is along the top of the page.

This will display the masked payment details on file for the customer account.

If the customer wants to update their payment details, you should encourage the customer to log into the UC Portal themselves and do so. This is for security purposes.

Once the customer is logged into the UC Portal, navigate the customer to the **Payment Methods** tab as described above. The customer will see the below screen.

1. **ADD NEW MANDATE**

   Clicking here will direct you to an external site which allows you to add your direct debit details, once these details have been confirmed direct debit will automatically become your default payment method.

2. **ADD A NEW CARD**

   Clicking here will allow you to add a new credit/debit card.

If you have a customer who pays you directly rather than paying Blueface, you can set up the account with a Direct Debit mandate. In this scenario you need to provide your own payment details. **It is against banking regulations for anyone other than the bank account holder to add a direct debit mandate.**

Should you run into any errors on this page, please reach out to the Accounts team **(accounts@blueface.com)**.

For more information, we recommend reviewing the **Payment Methods Mini Guide**.

2.2.2 ORDERS AND INVOICES

From the UC Portal, a Reseller can order new hardware for a customer, process payments for these orders and check invoices for the customer.

2.2.2.1 INVOICES

Once the order is placed, the invoice will appear on the **Orders** page. Select the shopping cart **Billing** icon on the left-side menu and select **Orders**.
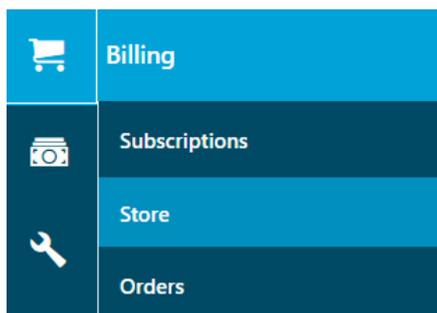
The orders page will provide the status of each invoice, the order reference, the invoice number, the total payment amount (including VAT) and the date the invoice is due for payment.

If there is an outstanding invoice, you can try to manually trigger payment by selecting the credit card button on the right-side in the same row as the outstanding invoice, which will bring up the **Pay the order** pop-up screen. You will have the option to pay with one of the existing payment methods on the account or to add a new payment method to attempt payment.
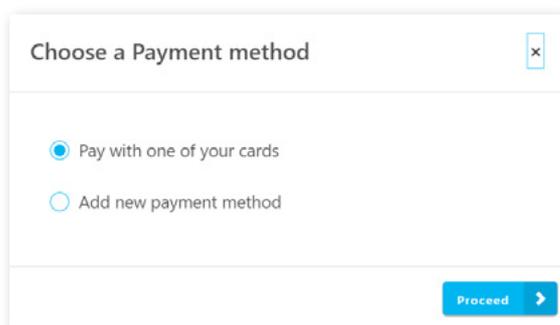
2.2.2.2 ADDITIONAL CHARGES

Some customers may raise issues concerning additional charges on their invoices. This can be found on the invoice itself. If you select **Billing** on the left-side menu and then select Orders again, you will find yourself with the list of invoices on the account. Select the invoice from the billing period in question and click on the order reference of the relevant invoice. This will redirect to the **Order Details** page, which breaks down the different charges of the invoice. If there is an entry for **Additional Charges**, this means the customer went over either their mobile or international minutes provided by their current subscription. This can be checked by reviewing their call history.

To find the customer's call history, select the **Phone** icon on the left-side menu and then select **Call History**.

The Call History page gives a user the ability to filter the call history on the account by the Start Date, End Date, User, From specific numbers and to specific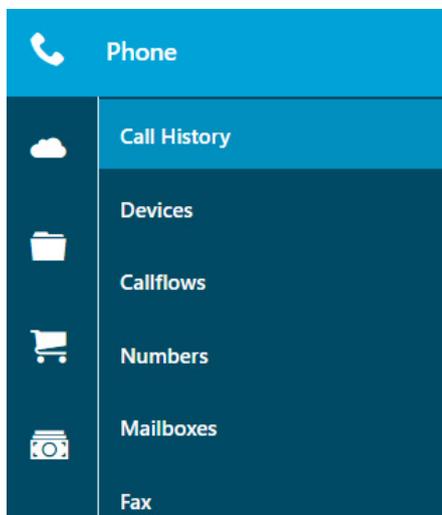 numbers. Additionally, if you tick the **Advanced Search** option, you have additional filters which can be applied to your search.

Once the filters have been set, you can export the call history into an .CSV file for easier data analysis. The important piece of information to know here is that to analyse the call history, you will need to check the **Duration** and **Cost** columns to identify how much time the customer spent over their allotment and what the cost was for that time. This should add up to the additional costs referenced on the invoice. If this is not the case, reach out to the Accounts Team for additional assistance. For additional information, we recommend reviewing the **Call History Mini Guide.**

2.3 USER SUPPORT

A customer may need to have a new user set up or have a user removed depending on whether they have staff joining or leaving the company. This can be done on the **Users** page, which can be found by selecting the **People** icon and then selecting **Users**.
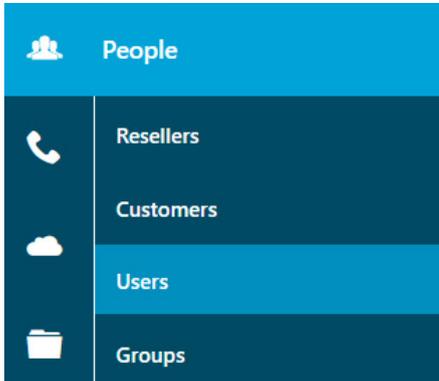
This page displays a list of the customer users on the account, with their username, email address, location, user role, and group visible. It is important to note to customers that only those users with the role of **Customer Administrator** will be able to make account level changes, such as updating a callflow or updating billing information.

To edit an existing user, select the pencil icon next to the user in question.

The first tab is the **User Details** tab, which is where the username, name, and email address of the user can be updated. Resellers also have the ability to update the User Role, should any user need to have Customer Administrator privileges.

The second tab is the **Settings** tab, which is where you can set Caller ID information for a user. Additional settings are described in more detail below. These settings are particularly important if you have the user's device set up to inherit settings from user, but we will touch on this in more detail under the Device Support section.

CLIR (Calling Line Identification Restriction) will prevent call recipients from seeing the number of the caller when enabled.

Block Anonymous Call will do exactly what it says, it will block calls from anonymous numbers when enabled.

Console will provide a user with access to the Console feature, which allows users to see when other users are on calls and provides an easy mechanism to transfer or intercept calls from the UC Portal.

Missed Call Notification will send the user an email when there is a missed call on their device.

Call Recording will record calls based on the customer's preference. Options include to Always Record, Optionally Record (caller will need to turn call recording on/off manually on each call they want to record), or Never Record. For more information, please refer to the **Call Recording Mini Guide**.

Call Barring at a device level for National, Mobile, International or Premium numbers when a selection is ticked.

Intercept Call allows the user to control who can intercept their calls, with options including Allow All users, Allow Some users, or Allow No users to intercept calls.

Can Send Fax needs to be enabled if this user wants to be able to utilise the e-fax service from the email address associated with their user profile.

Conference Room provides the room number and pin if the user needs to join a conference room.

Mobility Credentials are the user's unique credentials if hot desking is enabled on a device, and they wish to log into the device with their user profile.

The third tab is the **Devices** tab, which shows which devices on the account are allocated to this specific user. Please note a device can only be assigned to one user at any given time.

The fourth tab is the **Mailbox** tab. On this page you will have visibility over what mailbox is assigned to the user. Please note, for this user to receive voicemails, this mailbox will need to be added to a callflow. If the user does not have a mailbox, you can create and allocate a mailbox directly on this tab. For more information, please review the **Accessing Voicemails Mini Guide**.

The fifth and final tab is the **Groups** tab, which displays what groups the user is a member of. Groups can be used to better organise a callflow. For example, if you have an IVR set up to direct to the Sales team, rather than adding each person individually on a callflow, you can add the Sales group. Then you can add or remove people from a Group as required. For more information on Groups, please review the **Groups Mini Guide**.

2.4 DEVICE SUPPORT

In addition to the different levels of support you can provide to the customer related to their billing, Resellers will have the ability to provide support for customer's devices'. For a view of what devices are on the customer's account and to see which are active / inactive, select the Phone icon on the left-side menu and then select **Devices**.
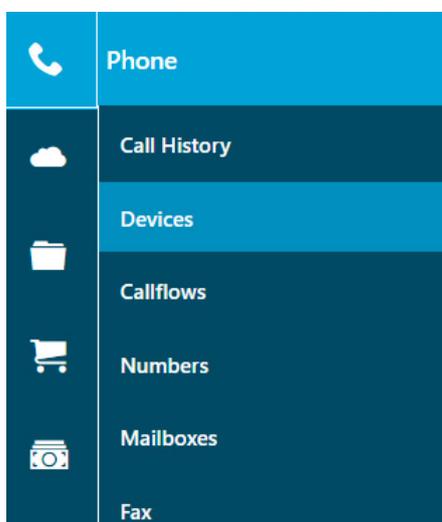
If you hover the mouse cursor over the **Line Status** indicator, it will show whether the device is Active, Inactive, Enabled for Do Not Disturb, or Disabled. If the device is Inactive, this means the device does not have an adequate connection to the network. This means the device set-up, cabling, internet connection or firewall setting should be reviewed in more detail.

If the user needs the device configuration updated, click on the pencil icon, which will redirect you to the **Edit Device** page.

The first page shows the name of the device and the MAC address. There are a few settings that can be enabled / disabled on this page, such as the below:

Voicemail Notification Subscribing the device for Voicemail Notification

DnD Enable which controls whether Do Not Disturb can be used on the device or not.

Call Barring at a device level for National, Mobile, International or Premium numbers when a selection is ticked.

Location which is the physical location of the device, often used for emergency service registration in specific countries.

If the customer is using a Softphone or UC Desktop Phone, it is on this page that you will be able to retrieve the username and password for their device.

If you select the **Device Lines** tab, this is where you can set up multiple lines on a phone. For example, if the customer has a Dublin and Galway number, you can set up one line to make and receive calls from the Dublin number and the other line to make and receive calls from the Galway number. Additionally, if the customer is using the Panasonic TGP600 with cordless TPA60s, a line is required to be set up for each individual cordless phone.

The drop-down arrow on the right-side of each line, provides additional settings that can be adjusted, including the following:

Allocate User should be pressed if you wish to assign a device to a specific user profile.

Inherit settings from User enables the device to autofill all settings for the device based on the Allocated User.

Block Anonymous Call will do exactly what it says, it will block calls from anonymous numbers when enabled.

CLIR (Calling Line Identification Restriction) will prevent call recipients from seeing the number of the caller when enabled.

Name Internal / External is the name the customer wants to appear when they make outbound calls to others in the company (on the same account) or externally to those outside the company.

Caller ID Number Internal / External is the number the customer wants to appear when they make outbound calls to others in the company (on the same account) or externally to those outside the company.

Call Recording will record calls based on the customer's preference. Options include Always Record, Optionally Record (caller will need to turn call recording on/off manually on each call they want to record), or Never Record. For more information, please refer to the **Call Recording Mini Guide**.

Call Waiting will allow the device user to hear a beeping sound if there is an incoming call when enabled. The device user can then place the current call on hold to take the incoming call. If disabled, there will be no call waiting and if another individual calls in while the recipient is on a call, the call will go to the next stage of the callflow.

Mobility will allow the device to be used for Hot Desking when enabled.

Country is to mark the country the device is located in.

Local Call Prefix allows the device to call numbers within the selected area code without needing to dial the area code. For example, if Dublin is selected, users will not need to dial 01 when dialling Dublin numbers.

The final tab for editing devices is the **Functions** tab. The **Functions** tab is not visible on UC Desktop or Softphone devices. This tab is where Call Parking, BLFs (Busy Lamp Field), and Speed Dials can be configured. These can only be utilised on certain device models. If you are not sure whether the device you are working with has expanded functions, please contact the Support Team by emailing **support@blueface.com** or calling **01 524 2000**.

If the device has expanded functions, you can select the pencil icon next to the button you wish to add an additional function to. **It is recommended to leave the first 4 lines free, as these spaces will function as the device's lines**.

Once you select the pencil icon, the **Edit Device Button Function** pop-up, pictured below, will appear:

Here you can select whether to add a Speed Dial, BLF or Park function.

> **For a new Speed Dial** you will just need to enter in the Display Name (what appears on the phone) and the number that should be dialed under the Parameter field.

> **For a new BLF** you will need to select the device on the account that you wish to show the status of on your phone and provide a Display name.

> **For a new Park** you will need to select what position in the Park you wish to assign to that Function button.

Once you have added additional functions, if you wish to change the positioning, you can drag and drop to change the positioning of the different items, making it easy to organise if a customer is particular about where certain functions appear on their phone.

For more information, we recommend reviewing the below Mini Guides, which go into additional detail:

- **Busy Lamp Field BLF Mini Guide**
- **Call Parking Mini Guide**
- **Device Functions Mini Guide**
- **Speed Dials Mini Guide**

2.4.1 GENERIC SIP DEVICES AND GENERIC SIP TRUNKS

Please note that if a customer is bringing their own devices, there is limited support that the Blueface team can provide to the customer. Configuration of the third-party devices is the sole responsibility of the Customer and/or Reseller. If the customer is experiencing issues with their hardware, the Blueface Support Team will test to ensure the UC Portal is functioning correctly. If this is confirmed, it is recommended to review the configuration of the device in question. It may be necessary to liaise with the hardware manufacturer's support team for assistance.

The only support the Blueface team can provide includes generating / regenerating the username and password for the Generic SIP, confirming the port number and confirming the domain address. All of the information is contained in an email that is sent to the customer administrator or reseller when the Generic SIP is added to the account.

If a Reseller wishes to receive these details directly for their customers instead of the customer administrator, please contact the Blueface Support Team by emailing **support@blueface.com** or calling 01 524 2000, who will enable this for you.

2.5 CALLFLOW SUPPORT

Callflow support is one of the leading types of queries that the Blueface Support Team receives. This could be as simple as adding a divert to a mobile number because a user is going to be out of the office, or the customer could be looking to input an interactive menu (IVR) with multiple options during specific times of the day.

As a first step, it is important to know which callflow is currently assigned to a particular number. For a view of all the numbers on an account, select the **Phone** icon on the left-side menu and then select **Numbers**.

The Numbers page provides a breakdown of all numbers, both internal and geographic numbers, on an account. If the customer needs an extension added, you can select the Add Number button on the top right hand side of the screen.

The Numbers page is broken down by the Number, Type of Number, the attached Callflow and Comment columns. If there is no callflow attached to a number, the Callflow/Email column will say **Not Set**. If you try to dial that number, you will hear a fast beeping and the line will disconnect. A callflow **must** be attached to a number for the number to work. If the number is a fax number, this column **must** contain an email address to receive electronic faxes.

To update the callflow in place for a specific number, select the pencil icon on the right-side of the row for the number in question.
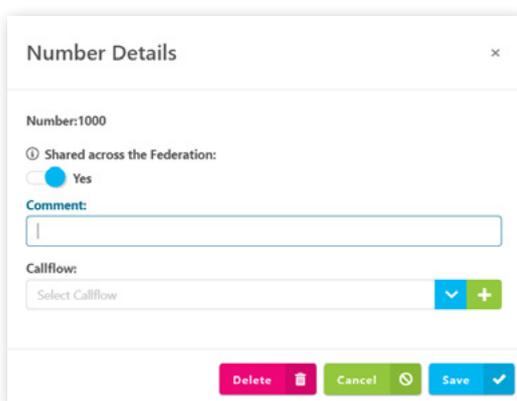
The comment field can be used to leave additional information about a callflow. For example, some customers will detail when a callflow was updated. In some scenarios, you may only change a callflow for a couple of days, so users may leave a note advising what the original callflow for that number is supposed to be so that it is easier to change it back. The Callflow drop-down is where you can browse all the callflows on the account and select the one you wish to assign to the number in question. To save the settings, select the **Save** button, and you have just changed the callflow!

That's all great, but you might be wondering ... how can I build a callflow? Select the **Phone** icon again on the left-hand side of the screen, but this time select **Callflows.**
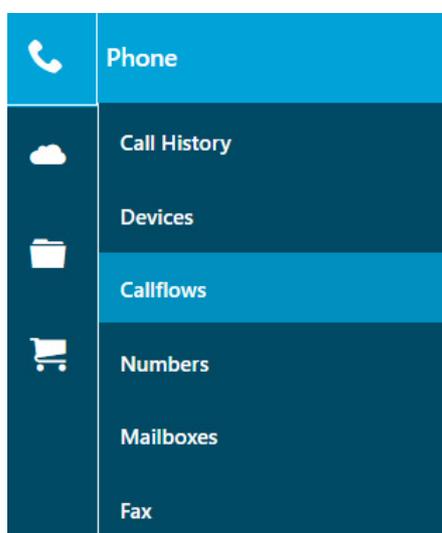
This page will provide a list of all the callflows on the account and provide information to what numbers they are assigned to and when they were last updated. The same callflow can be assigned to multiple different numbers. For example, if the customer has a Dublin and Galway number but the same individual will be answering calls for both numbers, you can assign the same callflow to both numbers. The caller can dial either the Dublin or Galway number and it will reach the same device.

To add a new callflow, select the **Create New Flow** button on the top right hand side of the page, which will direct you to the **Designer** page.
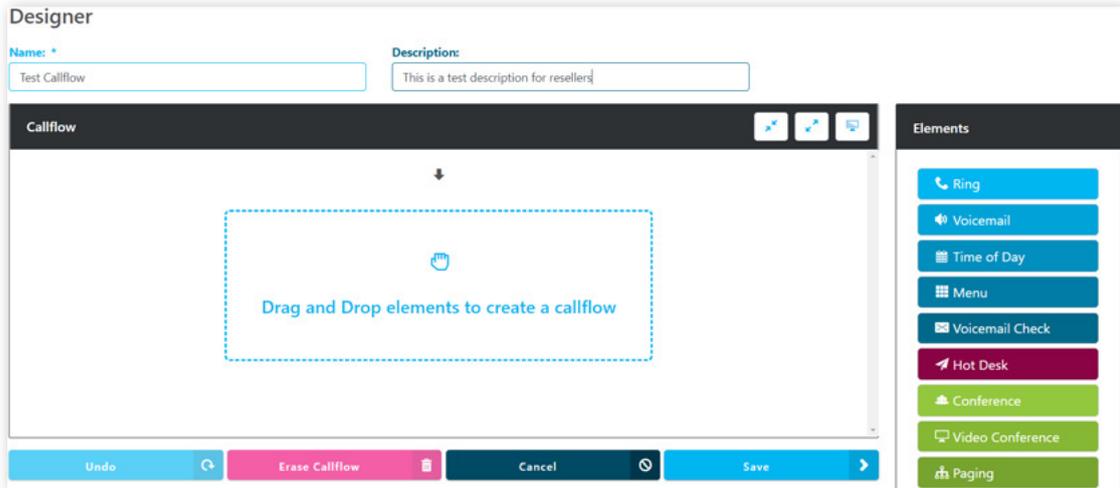
The Designer page works as a drag and drop system for pulling **Elements** from the right-side into the Callflow section to build your callflow.

For more information on building callflows and what the different elements mean, we would recommend looking at the different Mini Guides crafted on these subjects:

- **Callflows Mini Guide**
- **Creating an IVR Mini Guide**

3. Top Query Types

The top support queries that Blueface receives from customers are listed below:

- Unable to Make Outbound Calls
- Unable to Receive Inbound Calls
- Call Quality Concerns
- Handling Spam / Ghost Calls
- Busy Lamp Field Configuration
- Voicemail Support
- Sending and Receiving Faxes
- Softphone / UC Desktop Phone Support

If the customer is experiencing an issue, a good place to start is with the below checklist of questions:

- Approximately when did the customer first notice the issue?
- Ask for the MAC ID of the device(s) affected.
- Is there an error showing on the affected device's screen or heard when making a call?
- What colour is the status light on the affected device?
- Can the customer make calls to local, national, international numbers or internal extensions?
- Can the customer hear a message or tone when trying to make a call?
- Gather details of the number(s) being called by the customer, such as the carrier and the time and date stamp of calls that did not go through.

If the user is unable to receive calls, check to see if call barring or do not disturb is in place. If neither of those are in place, the next step would be to check that their device is online and is assigned to the correct callflow.

If the caller is unable to make calls, the first step is to check that the number they are dialing is correct. Try dialing the number from a non-Blueface phone to see if the issue is only with the Blueface network or with all networks. Check that the call attempts are appearing in the call history, as if it doesn't appear here then the call isn't making it to the recipient's network. Take note of any error messages that are playing when an attempt is made.

4. Blueface Support

If you are unable to answer the customer's question or resolve an issue, the Support Team (**support@blueface.com** / **01 524 2000**) is available from **8:30 am – 5:30 pm on Monday-Thursday and 8:30 am – 5:00 pm on Friday** to provide additional assistance.

When you are sending a ticket or calling the Support Team, it is important to have as much information as possible.

- Blueface is required to verify any Reseller or Customer that calls. Please have your account number ready, as well as additional details about your account, including verifying who the account holder is, your email address, your company's full name and address.

- If you are referring a customer to contact Blueface, please note that only Customer Administrators or above can make changes to the customer's account.

- If the customer's issue relates to call quality issues, please confirm that the customer's network is set-up according to the recommend firewall settings and as per the **Service Network Address and Ports Manual**.

- If there are call quality or call discrepancy issues, please provide recent timestamps of the issue. Any timestamp older than twenty-four hours will not be sufficient for the Support Team to investigate.

- If there is an issue with a specific device, please provide the MAC address of the affected device. This can be found on the back of the device and is used by the team to identify the device in the UC Portal.

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