



WorldSmart QuickStart Administrator Guide

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Introduction

While there are many features to WorldSmart, the basic steps to get your new WorldSmart account up and running are few and simple. As the account administrator, you will need to ensure that all of your organization begins using WorldSmart. While the entire setup may take some time (depending on the size of your organization) the essential steps are:

- Purchase seats
- Register users
- Create groups
- Purchase phone numbers and
- Set up your AutoAttendant Group Operator

These steps will help get your account up and running. After that, it is simply a matter of repeating these steps until you have covered your entire organization. To do this set up, you will need the following:

- An Internet connection
- Two computers / laptops. (Having them close to each other--in the same room, for instance--will be convenient.)
- Two headsets with microphones (You need to have them plugged into your computers or laptops, actually.)

In addition to the basic steps, this guide also offers some instructions to help you test the results of your operations. These include:

- Making phone calls using WorldSmart
- Calling your AutoAttendant

Before we go on to the actual steps, however, it will help to remember what WorldSmart offers you, and in what forms.

Components

Messenger: The WorldSmart Messenger enables users to interact with colleagues and clients effectively and provide online support through various ways.

Note: The instructions to download the WorldSmart Messenger are in Step 6 of this Guide.

The Dashboard: The dashboard is like an online office where you conveniently perform various operations like creating users, creating groups, purchasing phone numbers, creating AutoAttendant, and so on. You can log in to the dashboard from anywhere in the world as long as you are connected to the Internet. To log in, go to <http://www.worldsmartcentral.com>. Use the account name and password mailed to you at the time of account creation.



When you log in, you see the following screen:

Dashboard Tabs

The WorldSmart Account Administrator dashboard is tab-based. The tabs at the top of the screen are available from any page of the dashboard. Each tab, when clicked, displays a new page that offers various functions related to account management.

Getting Started

Step 1: Purchase Two Seats

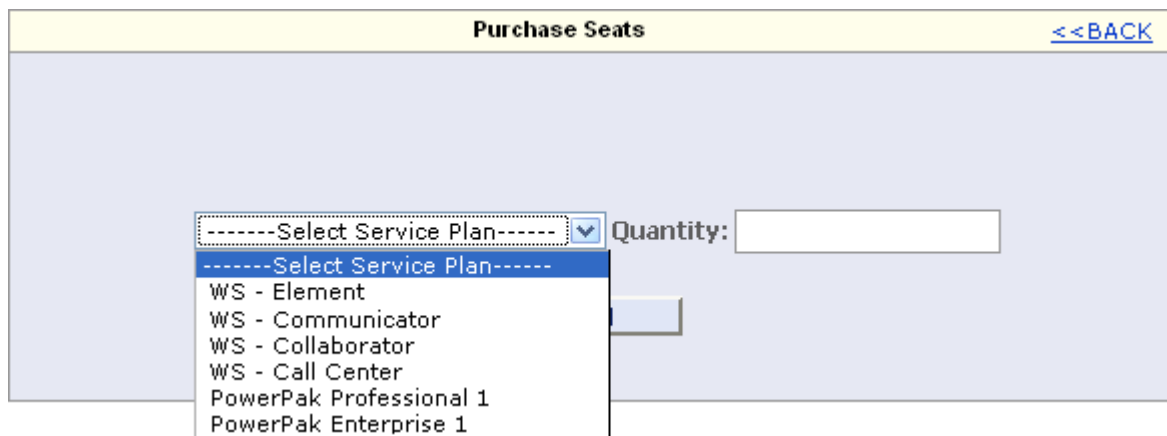
You can skip this step if your account is a trial account. Trial accounts are automatically created with five seats, so you can go on to the next step that explains how you can create users. To start using the WorldSmart account, the first step is to purchase seats. The seats purchased will be assigned to the users you will be creating. For now, you can purchase two seats and go on to the next step. Later, as necessary you can add more seats to your account.

To purchase seats for your account, click the **Manage Seats** link under the **Users** tab. This displays the screen as shown below:



The screenshot shows a web interface with a yellow header bar containing the text: "To manage seats or service package for your account, select the appropriate option below." Below this header are four radio button options: "Purchase Seats" (which is selected), "Delete Seats", "View All Purchased Seats", and "Swap Seats". At the bottom right of the options area is a blue button labeled "Next".

Click the button against **Purchase Seats** and click **Next**. This displays the screen as shown below:



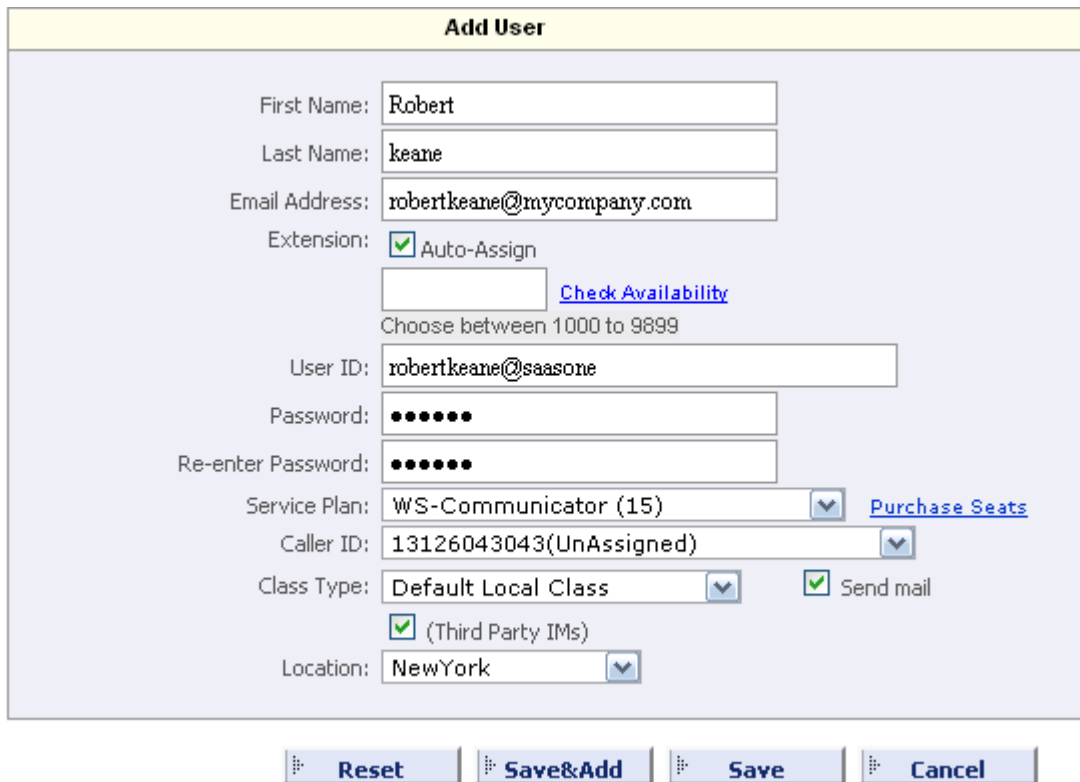
The screenshot shows the "Purchase Seats" form. At the top right is a blue "<<BACK" link. The main area contains a dropdown menu labeled "-----Select Service Plan-----" with a blue arrow pointing down. The dropdown list is open, showing the following options: "WS - Element", "WS - Communicator", "WS - Collaborator", "WS - Call Center", "PowerPak Professional 1", and "PowerPak Enterprise 1". To the right of the dropdown is a text input field labeled "Quantity:".

From the drop down list, select a service plan (WS-Element, WS-Communicator, WS-collaborator, WS-Call Center, PowerPak Professional-1, and PowerPak Enterprise-1) and enter the number of quantity you want to purchase. For now, you should enter **2** and click **Add**, and then **Purchase**.

For this quick set up, you may purchase two call center suites. Later on, you can choose service plans for each of your users based on their requirements.

Step 2: Create Two Users

To add users to your account, click the **Add Users** link under the **Users** tab. This displays the screen as shown below:



Add User

First Name:

Last Name:

Email Address:

Extension: Auto-Assign
 [Check Availability](#)
Choose between 1000 to 9899

User ID:

Password:

Re-enter Password:

Service Plan: [Purchase Seats](#)

Caller ID:

Class Type: Send mail
 (Third Party IMs)

Location:

1. Enter the **First** and the **Last Name** of the new user and enter their email ID.
2. Enter an email address in the **Email Address** field.
3. Click **Auto Assign** to assign an extension automatically.
4. Specify a User ID and Password for the new user. User ID should be entered in the following format:

username@accountname

For example, if your account name is mycompany.com, you could create the user ID of a person named John to be john@mycompany.com, or johnlastname@mycompany.com, or jlastname@mycompany.com, or any user ID you would like to give John.

The important thing is that each user must have a unique user ID, so if you have employees with the same first name, you will need to take this into consideration. Also, their user ID will be shown in the WorldSmart Instant Messaging window when they are logged in. This will allow other employees to know who John is by recognizing his user ID.



5. **Service Plan:** Select a service plan from the drop down list. If you have a trial account, there will only be one option available. If not, what options you have will depend on what seats you purchased in Step 1.
6. Leave the **Caller ID** field at its default value.
7. **Class Type:** Leave this field at its default value for now. More information regarding this feature is available in the Create Zones section of the Administrator Guide.
8. Select a Location for the user from the drop down list
9. Click **Save and Add**. This will create a new user and display the **Add User** screen again, so that you can add another user.

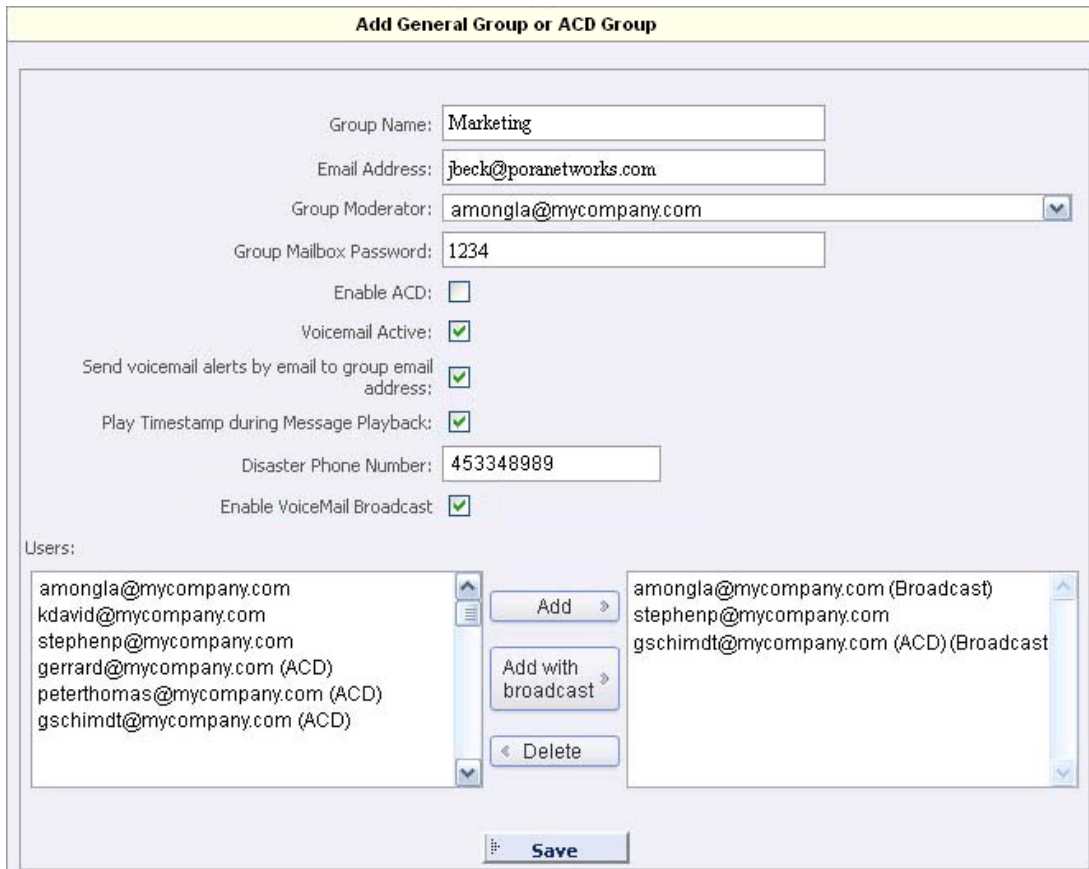
Repeat the steps above to create another user. This time, click **Add** instead of Save and Add. With two users, you will be able to make test calls and see that your new account is functioning properly.

IMPORTANT: Be sure to note the extensions of the two new users on a piece of paper. You can see the extensions by clicking the Users tab. In the screen displayed, you will find these extensions displayed next to the names of the users:

[Login] [Edit] [Delete]	samuel@newsaaas	1012	Samuel Collins	Assign Phone Number	PowerPak Enterprise-1
[Login] [Edit] [Delete]	jimmy@newsaaas	1010	Jimmy Carter	Assign Phone Number	

Step 3: Create a Group

The next step is to create a group within your account. To create a group, click the **Users** tab to navigate to the Users screen. Click the **Add Groups** link. This displays the **Add General Group** screen. ACD groups, AutoAttendant groups, and BLA groups, can be created from the respective tabs:



1. Enter the name you wish to assign to the new group in the **Group Name** field. Various departments in your organization, such as sales, billing, and support can be created as groups.
2. Enter your Email ID in the **Email Address** field. Emails or Voicemails for this group will be sent to this email address, which can be changed later.
3. Leave the **Group Moderator** field at its default value, which is **Select Moderator**.
4. Enter a **Mailbox Password** (for example, 1234) for the new group. This password will be used to access the group's voice mails.
5. Enable the check-boxes based on your preferences

6. Leave the **Disaster Phone Number** empty for now. More information on this feature is available in the WorldSmart Account Administrator Guide.
7. **Enable VoiceMail Broadcast:** Selecting this check box will enable the 'Add with Broadcast' option. With this option you can create a voicemail distribution list for the group. Users added by clicking the '**Add with Broadcast**' button will receive a copy of all new group voicemails in their personal voicemail box too.
8. Click and select the two users you have just created and click **Add** to make them a part of this group.
9. Click **Save**. Your new group is now created.

Step 4: Purchase Phone Number

While your account may eventually need multiple phone numbers, for this quick set up, you can purchase one phone number using the instructions below.

Click the **Users** tab. Here, click the **Account Add-ons > Phone number** link on the blue horizontal line towards the top of the page. This displays the Manage Phone Numbers screen shown below:



The screenshot shows a web interface for managing phone numbers. At the top, a yellow banner contains the text: "To manage the phone numbers for your account, click the appropriate option below." Below this banner is a list of seven radio button options: "Purchase Phone Numbers", "Delete Phone Numbers", "View All Purchased Phone Numbers", "Un-assign Phone Numbers", "Assign Multiple Phone Numbers", "Manage Custom Phone Numbers", and "Manage Smartcast Phone Numbers". The "Purchase Phone Numbers" option is selected, indicated by a green dot. At the bottom right of the list is a blue button labeled "Next" with a small icon of three dots to its left.

Select the **Purchase Phone Numbers** radio button and click **Next**. This displays the Purchase Phone Numbers screen as shown below:

Purchase Phone Numbers [<<BACK](#)

-----Select STATE----- ▼
---Select Code---- ▼
Quantity:

Don't see the STATE for which you want phone numbers in this list? Click [Request](#), tell us for which state and area code you want phone numbers, and we'll make them available accordingly.

In the Purchase Phone Numbers screen:

1. Click the **Select State** field and, from the drop-down list displayed, select the state within which you need a phone number.
2. Click the **Select Code** field and select the area code within which you need the phone number.
3. Enter **1** in the field **Quantity**.
4. Click **Add**.

A confirmation message is displayed on the screen. Click **Purchase** to complete the operation.

IMPORTANT: Be sure to write down this phone number. You will need it for a test call later.

As it is noted at the bottom of the purchase phone numbers screen, if you do not see the state or area code that you would like, you may click the request link to request a specific area code and prefix. If you purchase to a phone number that is already available, that number is activated immediately. If you request one that isn't currently available, it takes approximately 2-3 weeks to activate it.

Step 5: Assign Phone Number to Group

When you create an account, an AutoAttendant called Main is automatically created with it. Later, you can add more AutoAttendants, or delete this one. For now, we will work with this default AutoAttendant.

Click the **AutoAttendant** tab. This displays the following default screen:

Add Group:	<input style="width: 90%;" type="text"/>	Email Addr:	<input style="width: 90%;" type="text"/>	<input type="button" value="Add"/>
Group Name	Group Mail ID	Mailbox Extension	Moderator	Phone Number
Main	sally@mycompany.com	[2]	-----	Assign PhoneNumber View / Delete
				1 1 1 1 First Prev Next Last

Click the **Assign Phone Number** link in the upper-right area of this page. This displays a new window, as shown here:



Use the arrow buttons to view the drop down menus; select State, Area Code, and finally the phone number. Since so far you have purchased only one phone number, there will only one option under each of the drop down menus.

Click **Get Phone Number**.

This phone number is now assigned to the group you created. When this operation is successful, you see this number displayed in place of the **Assign Phone Number** link.

Step 6: Select Operator

Some companies prefer to have a person greet their callers, while others prefer a recorded greeting that allows callers to choose the group or user they wish to speak to. Both these options are supported by WorldSmart, and you can choose either of them. Since the main concern at the moment is a quick set up, we will configure only one of these options: the live operator.

This involves assigning a phone number to your AutoAttendant (we just completed this step), and assigning a user as the operator.

This part of the set up is also to be done under the same **AutoAttendant** tab. In the AutoAttendant page, click **View** against your Main AutoAttendant, as indicated in this image:

Add Group:		Email Addr:		Add	
Group Name	Group Mail ID	Mailbox Extension	Moderator	Phone Number	
Main	sally@mycompany.com	[2]	-----	Assign PhoneNumber	[View / Delete]
					1-1 of 1 First Prev Next Last

This display a screen which lets you edit all aspects of your AutoAttendant. For now, we will only be specifying an operator for the AutoAttendant. The screen that is now displayed lets you choose which aspects of the AutoAttendant you wish to edit. The three sections on this screen are Greetings, Settings and Group Settings. Click the **Edit** button against the Settings section, as shown below:

▼ Edit

Greetings

00 : 00 AM To 11 : 59 PM default

▼ Edit

Settings

Operator Type

Operator

Time Zone (GMT-08:00)Pacific Time (US & Canada) Tijuana

▼ Edit

Group Settings

Extension	Group	Extension	Group
<u>1</u>	-----	<u>2</u>	-----
<u>3</u>	-----	<u>4</u>	-----
<u>5</u>	-----	<u>6</u>	-----
<u>7</u>	-----	<u>8</u>	-----

This displays a new screen where you can specify or edit the operator for your AutoAttendant:

Settings

Operator Type User ▼

Operator john@mycompany.com ▼

Time Zone (GMT-08:00)Pacific Time (US & Canada) Tijuana ▼

Update

- For Operator Type, select **User**.
- For Operator, select one of the two users just created.
- Click **Update**.

Step 7: Download the WorldSmart Messenger

Enter your Admin account name and password. On the home page, click the link **Latest WorldSmart Messenger** under the Downloads section visible on the lower left hand side of the page.

The screenshot shows the WorldSmart Administrator interface. The top navigation bar includes links for My Home, Reporting, Users, FAX /Conference, ACD Preferences, AutoAttendant, Contacts, Email, and Home. Below this is a secondary navigation bar with links for Disaster Settings, Phone Provisioning, Site Survey, 911 Configuration, Device Status, Moderator Settings, and 411 Listing. The main content area is divided into several sections:

- Left Sidebar:** Contains links for Buy Phone Numbers, Buy Suites Now!, Buy Phones/Hardware, Smartcast, Download Latest Messenger (highlighted in a red box), and Help Center.
- Account Summary Table:**

Account Summary		Current Month		Detailed Billing	
Registered Users	33	WorldSmart IP Minutes	0.0	Charges	0.00
Common Seats	0	PSTN Inbound Minutes	0.0	Charges	0.00
Registered Phone Numbers	30	PSTN Outbound Minutes	0.0	Charges	0.00
Used Phone Numbers	16	Inbound Toll-Free Minutes	0.0	Charges	0.00
Toll-Free Phone Numbers	2	International Minutes	0.0	Charges	0.00
Local Phone Numbers	28	Conference Minutes	0.0	Charges	0.00
		Flat Fee		Charges	381.98
		Total	0.0		
- Seat Summary Table:**

Service Name	Present Seats	Used Days (Days * Seats)	Monthly Rate (\$)	Charge (\$)
WS-Element	9	45	\$ 39.95	\$ 57.99
WS-Collaborator	4	20	\$ 39.95	\$ 25.77
WorldSmart Call Center	3	15	\$ 59.95	\$ 29.01
WS-Communicator	6	30	\$ 59.95	\$ 58.02
WS-Call Center	1	5	\$ 99.95	\$ 16.12
PowerPak Enterprise-1	11	55	\$ 109.95	\$ 195.07

A red arrow points from the 'Download Latest Messenger' link in the sidebar to the text 'Download Messenger' located below the tables.

This takes you to the WorldSmart Messenger download page. Follow the instructions provided on the page to install the WorldSmart Messenger on to your system.

In the course of the installation, a screen prompt will ask you if you wish to install the Outlook Toolbar Add-in for WorldSmart. Click **Yes**. (For further information, please refer to the WorldSmart Outlook Toolbar Integration section under Telephony in the WorldSmart User Guide.

On the completion of the installation for the WorldSmart Messenger, you will be prompted to enter your user ID and password. This is not the Administrator user ID and password; this is the user ID for one of the users you created, which you should have written down.

Repeat this process on your other computer too. Once you have installed the WorldSmart Messenger on both your systems, the quick setup is complete. You can now try making some test calls.

Test 1: Make an Extension to Extension Call

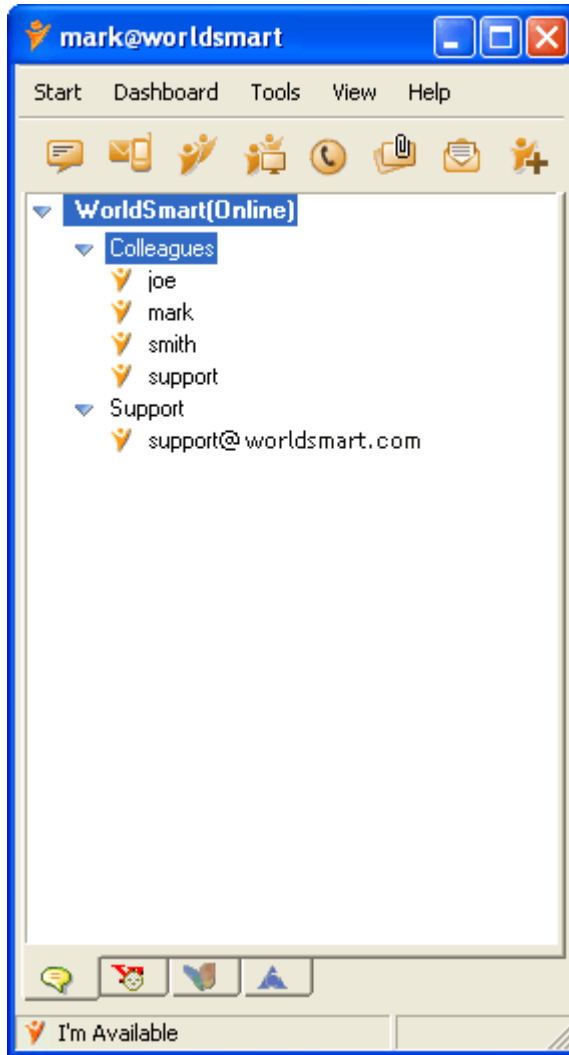
Make sure you have headsets or speakers and microphone connected to both systems. To login to the WorldSmart Messenger, click the WorldSmart Messenger icon on your desktop or on your task panel. The WorldSmart Messenger icon is orange and was automatically installed on your desktop during the installation of the WorldSmart Messenger. This displays the WorldSmart Login window shown below:



- Enter the User ID and Password of one of the users just created.
- Check **Sign in Automatically**.
- Click **Login**.

Repeat this process on the other computer too, but this time, be sure to use the User ID and Password of the second user.

A successful login opens the WorldSmart Messenger Interface as shown below:





Click on the phone  icon. This displays the WorldSmart SmartPhone:



Dial the extension of the other user and click **Dial**. The other computer will receive a popup notification screen as shown below:



Test 2: Call your AutoAttendant

1. Open the WorldSmart SoftPhone as described earlier. Make sure you are using the SoftPhone of the user who has NOT been selected as the Operator.
2. Dial the phone number you just purchased and assigned to your main AutoAttendant. When the call connects, you will hear the following message:
3. "Hello! Thank you for calling us....Press Zero to speak to the operator." (This greeting can be completely customized in the Greetings section of the AutoAttendant tab, but more about this in the Administrator Guide.)
4. Press **Zero**. The call will be routed to the user you selected as the Operator in Step 5.
5. The Operator can receive the call and transfer it to other users or phone numbers after speaking to the caller.



Conclusion

The basic setup of your new WorldSmart account is now complete. There is, of course, much more that you can do with WorldSmart. Here are a few of the things that you can do:

- Create ACD (Automatic Call Distribution) groups, and configure them to suit your needs. (The ACD feature is available only to accounts that use the WS-Call Center or PowerPak Enterprise1 service plan.) Users having WS-Communicator or PowerPak Professional-1 can get this feature by adding SmartACD as an Add On.
- Assign some users in your account as moderators, so that they can manage selected ACD or AutoAttendant groups on your behalf
- Create conference rooms so that people can join an audio conference simply by dialing a number selected by you
- And so on

For detailed help with these and other WorldSmart features, please refer to the WorldSmart Account Administrator Guide. You can access this guide from the home page of your WorldSmart Administrator Dashboard, where it is available in the same Downloads section which you have used to download the WorldSmart Messenger.