



BroadCloud – Call History Quick Reference Guide

Document version 1.0, dated 26 April 2017

Frontmatter information

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Acknowledgements

The content herein is based on the following document provided to Cloud Direct as a service provider and reseller of this product:

- BroadCloud PBX – Call History, ©BroadSoft, Inc.

The original document remains untouched, with the following exceptions which have been made to ensure a positive experience for customers of Cloud Direct:

- Where appropriate, contact details and web links amended to reflect Cloud Direct.

Contacting Cloud Direct

If you require advice or assistance regarding this product, then please contact Cloud Direct using the following contact details.

| For | Phone | Email |
|------------------------------|--------------|--|
| Sales | 0800 0315966 | sales@clouddirect.net |
| Technical Services (support) | 0800 0789438 | Tech_Services@clouddirect.net |
| Customer Services | 0800 0789437 | |

Overview

Phone calls are the lifeblood of most businesses. Having an easy way to understand call volumes can be helpful for both management and individual users.

As a My Account administrator, you can view the call history for each number assigned to your account. Call history includes such information as start date, start time, calling number, called number, caller ID, caller ID information (city and state), call duration, and type of call (outgoing, incoming and missed). Management can then further use this call history information as a means of determining needed resources, insuring that remote workers are responding to calls effectively and that they are using their time efficiently.

Individual users want a simple way to see their call history (outgoing, incoming and missed) and to place calls via the click to dial feature.

Feature Usage

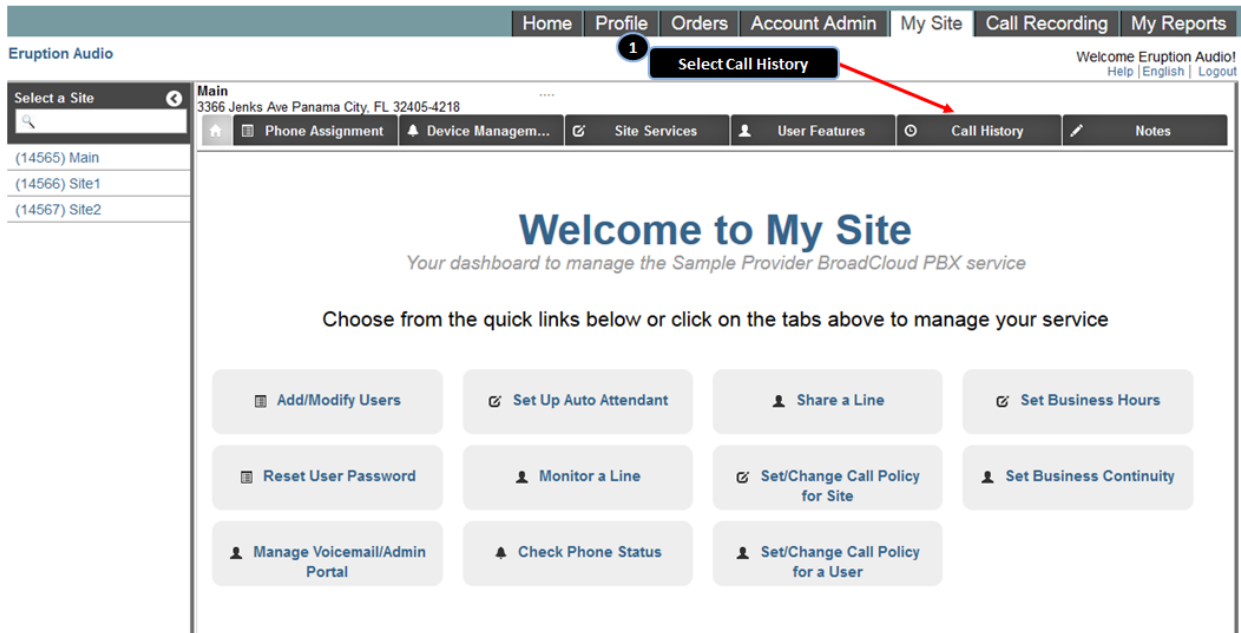
Administrator Access via My Site

To use the Call History page, the Site administrator must log into My Account, and simply follow the steps detailed below.

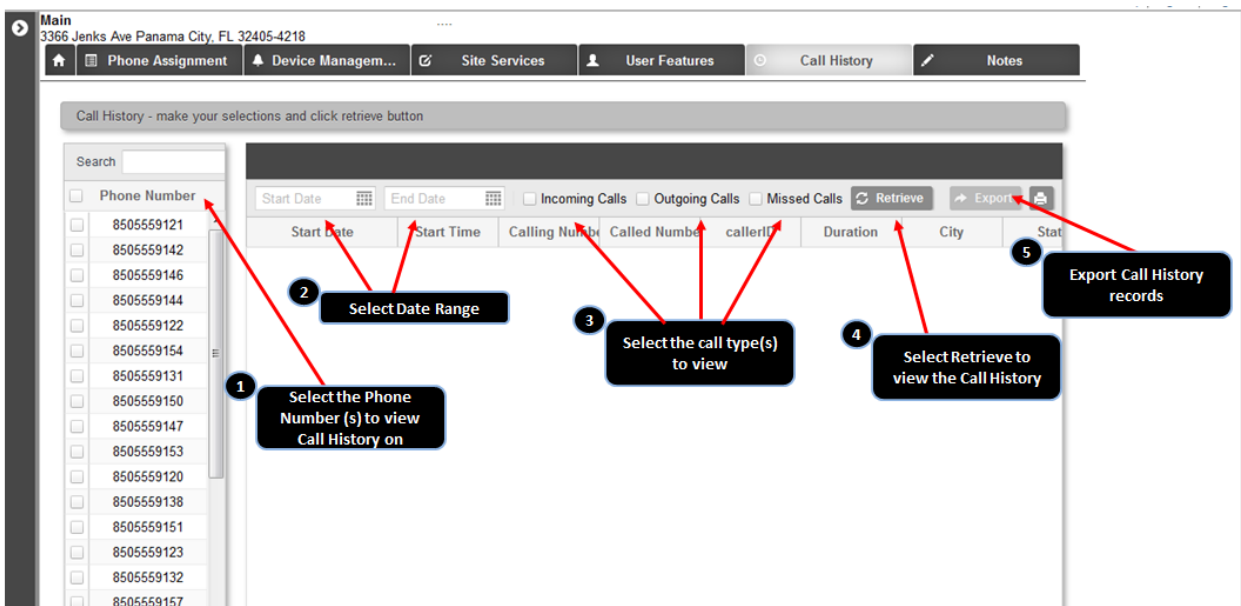
Step 1. Double click to select the appropriate Site to configure



Step 2. Go to the Call History tab



Step 3. Define the Search Criteria



1. Select the numbers to view.

Use the check mark to select the numbers for which you would like to view call history.

- a. Enter a number or partial number to search. For example, to view all call history within the 813 area code, enter **813**.

2. **Select the Date Range** Select the Start and End date associated with the data that you want to report on
3. **Check the type(s) of Call(s) to view.** You may view any or all of the following:
Outgoing Calls
Incoming Calls
Missed Calls
4. **Click the Retrieve Call Records button.** Displays call history records according to the selected parameters

5. Review and Export Call History

NOTE: Exporting the Call History will result in a .CSV file with all of the viewable content available to be saved to the user's PC for further analysis or specialized reporting.

Individual Users Access via My Phone

To use the personal Call History page, the User must log into to their My Phone dashboard, and simply follow the steps detailed below.



The screenshot shows the BroadSoft My Phone dashboard. At the top, there is a header with the BroadSoft logo, a user profile section labeled 'USER4' with a dropdown arrow, and links for 'Profile', 'Support', and 'Sign Out'. Below the header is a navigation bar with tabs: 'Home', 'My Messages', 'My Features', 'My Rules', 'My Numbers', and 'My Call History'. A red arrow points to the 'My Call History' tab, which is highlighted. A callout box with the number '1' and the text 'Select My Call History' points to the 'My Call History' tab. Below the navigation bar, the main content area is titled 'Welcome to the BroadCloud PBX User Dashboard'. On the left side of the main content area is a vertical image of a PBX switchboard. To the right of the image are several sections of text describing the dashboard features: 'This site allows you full access into your personal phone service settings...', 'My Messages — Make sure you get your messages, regardless of your location...', 'My Features — Access to user features like Call Forwarding, Call Waiting, and Anywhere...', 'My Rules — Selected call handling based on the phone number of the person calling...', 'My Numbers — An easy to use inventory of numbers that can be selected for feature assignments...', and 'My Call History — A quick view of recent calls, whether they were made by you, answered by you, or missed altogether...'.

USER4

Profile

Support

Sign Out

E911 address: 9737 Washingtonian Blvd 350 Gaithersburg, MD 20878-7387 L

1

Select the timeframe to report on

Home

My Messages

My Features

My Rules

My Numbers

My Call History

MY PHONE

Call History - recent usage may be unavailable to be displayed

Start Date

End Date

Incoming

Outgoing

Missed

Refresh

2

Select the call type to view

| Start Date | Start Time | Other Party | Caller ID | Duration | City | State | Zip | Type |
|------------------------------|------------|-------------|----------------|----------|-----------|-------|-------|------|
| Mon Aug 19 | | | | | | | | |
| Mon Aug 19 2013 14:27:36 CDT | 3:27 pm | | Gerard Mulford | 6s | Rockville | MD | 20850 | |
| Mon Aug 19 2013 11:27:39 CDT | 12:27 pm | | Gerard Mulford | 24s | Rockville | MD | 20850 | |
| Mon Aug 19 2013 11:21:17 CDT | 12:21 pm | | Gerard Mulford | 6s | Rockville | MD | 20850 | |
| Mon Aug 19 2013 11:20:33 CDT | 12:20 pm | | Gerard Mulford | 6s | Rockville | MD | 20850 | |

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Click on the phone icon to initiate a call

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