

Admin's End-User Phone Number Configuration

Process Optimization

Background

As an admin who manage thousands of users, sometimes she/he might assign the wrong phone numbers (on the dimension of number location) to users, and she/he won't be able to figure out until users reported the wrong configuration. She/he want to make sure she/he did things right after configuration change and let end user know if there's any correction.

Desired Use Cases

Admin wants an automatic check mechanism to ensure that the wrong number configuration will be found out before user reported, after discovering the wrong number configuration, she/he wants to have the ability to correct the error at once, and inform the user what has been changed.

Design Requirements

- Admin can select users' location in Add User Function > Assigning Credentials Option.
- Users can select their location in Set Up Account Email's Link sending by admin.
- System should have a timer to check the user's phone number configuration.
- Admin can audit users' phone number configuration status in User List / User Detailed page.
- Admin can change users' phone number by the entrance in User List/User Detailed page.
- Admin can notify user through system after she/he correct the wrong configuration.

Issues in Epic

- [Support location selection in Add User Function > Sent Invite & Activate by assigning credentials. \(P0\)](#)
- [Automatic check users' phone number configuration by back-end timer. \(P0\)](#)
- [Alert Icon for User's phone number on User List & User Detailed page. \(P0\)](#)
- [Change Phone Number entrance on User List & User Detailed page. \(P1\)](#)
- [Confirmation pop-up of send notification email after reassign is done. \(P1\)](#)

Support Location Selection in Add User Function

Type: User Story

Priority: High

Description

Requirement

As an admin, I should be able to select users' location in Add User Function > Assigning Credentials Option/ Send account activation email with location options.

1. Add City select box and State/Province select box in Admin Portal > Users > User List > Users with Extensions > Add User > Setup Options > Activate by assigning credentials. In

Credential

Password * ⓘ

☒ Temporary Password ⓘ

PIN * ⓘ

Security Question *

What was your childhood nickname?

Reenter Password *

Reenter PIN *

Answer *

User Location

Country

United States(1)

State/Province

Select State/Province

Time Format

☒ 12h (AM/PM) ☐ 24h

City

Select City

Emergency Response Location ⓘ

This user has a digital line and therefore requires a valid emergency response location assignment before activation.

+ Add

Remove

☐

Name

Emergency Response Location

☐

rc li

[Add](#)

User Location

Country

United States(1) ▼

State/Province

Select State/Province ▼

Search

Alabama
Alaska
Arizona
Arkansas
California
Colorado
Connecticut
Delaware
District Of Columbia
Florida

Time Format

☒ 12h (AM/PM) ☐ 24h

City

Select City ▼

Search

Apopka
Baldwin
Belle Glade
Boca Raton
Boynton Beach
Boynton Beach
Bradenton
Brooksville
Callahan
Cantonment

Requires a valid emergency response location

Emergency Response Location

[Add](#)

2. Add City select box and State/Province select box in the email link sending from > Users > User List > Users with Extensions > Add User > Setup Options > Send Invite > My Info > Regional Settings. Details are as follows:

2 Regional Settings

Country

United States (1) ▼

Time Format

☒ 12h (AM/PM) ☐ 24h

State/Province

Select State/Province ▼

City

Select City ▼

Time Zone

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

Continue

2

Regional Settings

Country

United States (1) ▼

Time Format

☒ 12h (AM/PM)

☐ 24h

State/Province

Select State/Province ▼

Search



Alabama

Alaska

Arizona

Arkansas

California

Colorado

Connecticut

Delaware

District Of Columbia

Florida

City

Select City ▼

Search



Apopka

Baldwin

Belle Glade

Boca Raton

Boynton Beach

Boynton Beach

Bradenton

Brooksville

Callahan

Cantonment

Scope

Service Web

Automatic check users' phone number configuration by back-end timer

Type: User Story

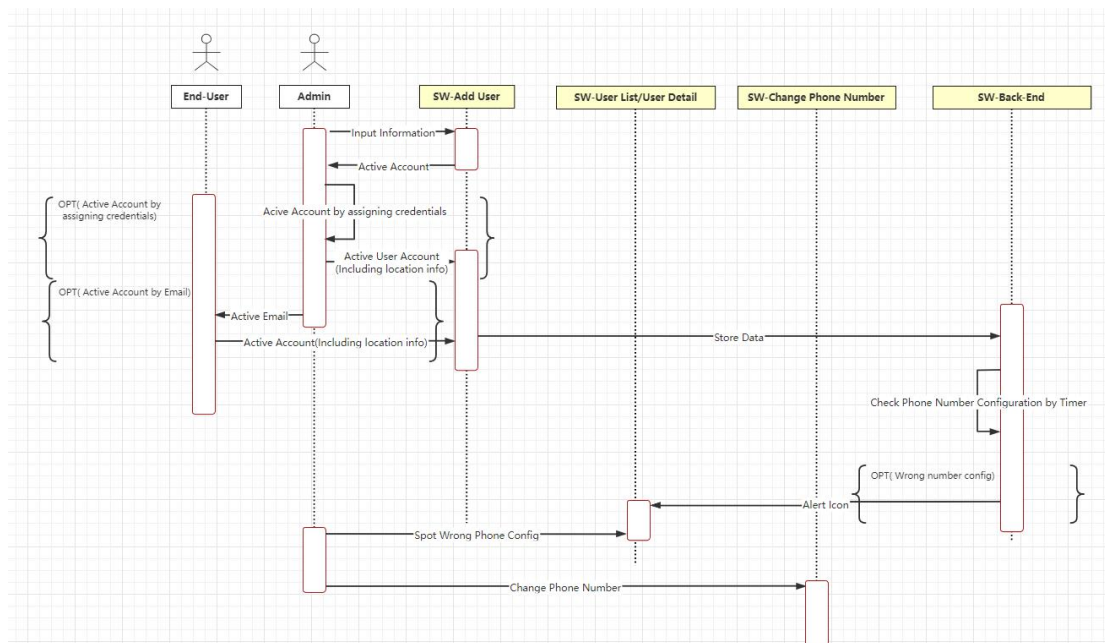
Priority: High

Description

Requirement

As an admin, I want system can automatically check if there is any wrong on users' phone number configuration.

1. Add a back-end timer automatically check if user's phone number attribution equals user's city. Details are as follows:



2. Add a user phone configuration status field in Database.
3. Only DL numbers will be checked on this Version. Direct Number type requires further research and design since it doesn't have a reassign function existing.

Scope

Service Web

Alert Icon for User's Phone Number on User List & User Detailed Page

Type: User Story

Priority: High

Description

Requirement

As an admin, I want to have the ability to audit all users' phone number assignment without having to check it one by one.

1. Add Alert Icon in Admin Portal > Users > User List > Users with Extensions > User List > Number Column if status is warning, status data comes from the issue : [Automatic check users' phone number configuration by back-end timer]'s second requirement. A notification will be displayed when the mouse stops over the icon. Details are as follows:

Search

+ Add User

Download User List

Delete

✓

Enable

✕

Disable

↻

Send Invite

🔑

Set Credentials

📄

Apply Templates

<input type="checkbox"/>	Status	Name	▼	Number	Ext.	Licenses	Roles	Department	Msg.	Actions
<input type="checkbox"/>		Jack Black		(650)642-9504	12	MVP	Standard		0 / 0	<div>⋮</div>
<input type="checkbox"/>		briantest1 test		(650)642-9504 (251)332-4514	104	MVP	Billing Admin	wtatever	5 / 5	<div>⋮</div> <div>⌵</div>
<input checked="" type="checkbox"/>		ForDemo1 Only (Super Admin)		(650)666-0835	101	MVP	Super Admin		75 / 133	<div>⋮</div>

<div><div>Delete</div><div>✓ Enable</div><div>✗ Disable</div><div>📧 Send Invite</div><div>🔑 Set Credentials</div><div>📄 Apply Templates</div></div>										
<input type="checkbox"/>	Status	Name	▼	Number	Ext.	Licenses	Roles	Department	Msg.	Actions
<input type="checkbox"/>	⚠️	Jack Black		(650)642-9504	12	MVP	Standard		0 / 0	⋮
<input type="checkbox"/>	✅	briantest1 test		(650)642-9504 (251)332-4514	104	MVP	Billing Admin	wtatever	5 / 5	⋮ ⬆️
<input checked="" type="checkbox"/>	✅	ForDemo1 Only (Super Admin)		(650)666-0835			Super Admin		75 / 133	⋮

Wrong phone number assignment. Click number to edit

2. Add Alert Icon in Admin Portal > Users > User List > Users with Extensions > User List > User Detailed Page > Phones & Numbers > Phone List if status is warning, status data comes from the issue : [Automatic check users' phone number configuration by back-end timer]'s second requirement. A notification will be displayed when the mouse stops over the icon. Details are as follows:

Ext. 12

Outbound Calls/Faxes

Meetings

Notifications

▼ User Details

^ Phones & Numbers

Primary Number

(907) 290-8415

Edit

Phones

Numbers

Conference

+ Add Phone

⊕ Presence

⋮

ⓘ

Phone Nickname	Phone Type	Number	▼	Actions
RingCentral Phone app	RingCentral Ph...	(907) 290-8415	●	⋮

▼ Screening, Greeting & Hold Music

+ Add Phone

⊕ Presence

⋮

ⓘ

Phone Nickname	Phone Type	Number	▼	Actions
RingCentral Phone app	RingCentral Ph...	(907) 290-8415	●	⋮

Wrong phone number assignment.

Scope

Service Web

Change Phone Number entrance on User List & User Detailed page.

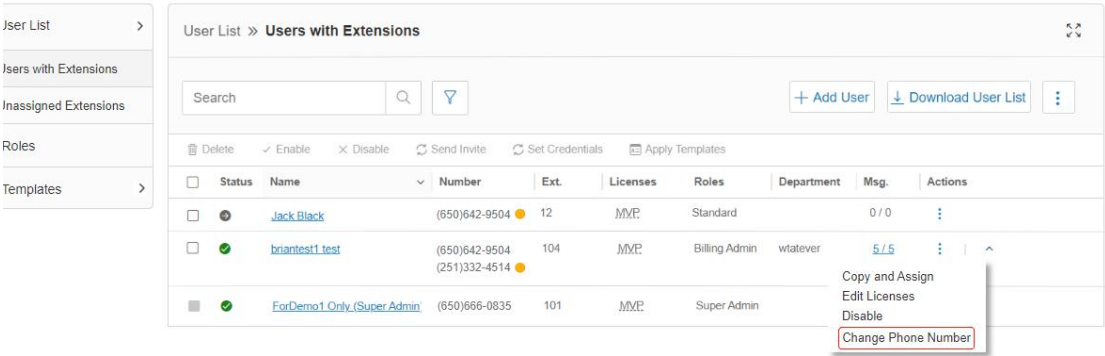
Type: User Story
Priority: Normal

Description

Requirement


As an admin, I want to have the ability to correct the wrong phone number configuration once I spot it.

1. Add 'Change Phone Number' button in Admin Portal > Users > User List > Users with Extensions > User List > Actions Column, by clicking this button, a pop-up will display and let admin choose the number she/he want to change. If is a DL number, page will display the same pop-up as Admin Portal > Phone System > Phones & Device > User Phones > Device Detailed Page > Edit Number Function, otherwise another pop-up will display and inform admin the she/he can not change direct number.



Change Phone Number

Which phone number do you want to change?

☒ (650)642-9504 

☐ (251)332-4514

Cancel

Next

Only (Super Admin)

(650)666-0835

101


MVP

Super Admin

75 / 1

Change Phone Number

Which phone number do you want to change?

☒ (650)642-9504 

☐ (251)332-4514

Wrong phone number assignment.

Cancel

Next

RingCentral



Home Users Phone System Meetings Reports Billing More

User List

Users with Extensions

Unassigned Extensions

Roles

Templates

Change Phone Number

1 Change Number

2 Keep Previous Number

3 Confirm Order

4 Order Confirmation

Number Inventory

New Numbers

Search

Locations

Number	Name	Location
<input type="radio"/> (823) 267-5806		United States, Buckeye, AZ

Total: 1

Show: 10

< 1 >

Cancel

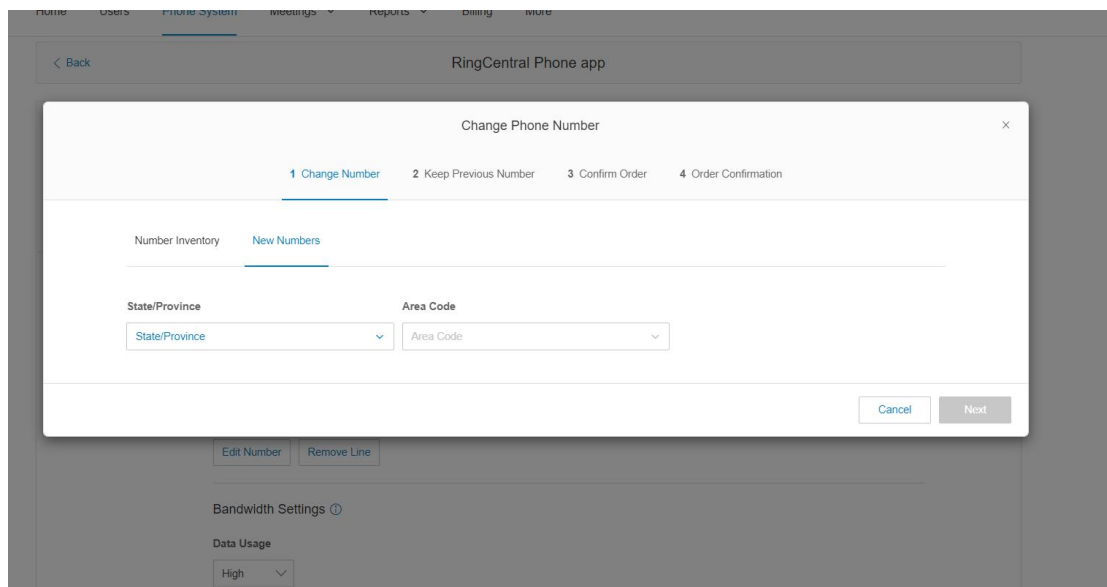
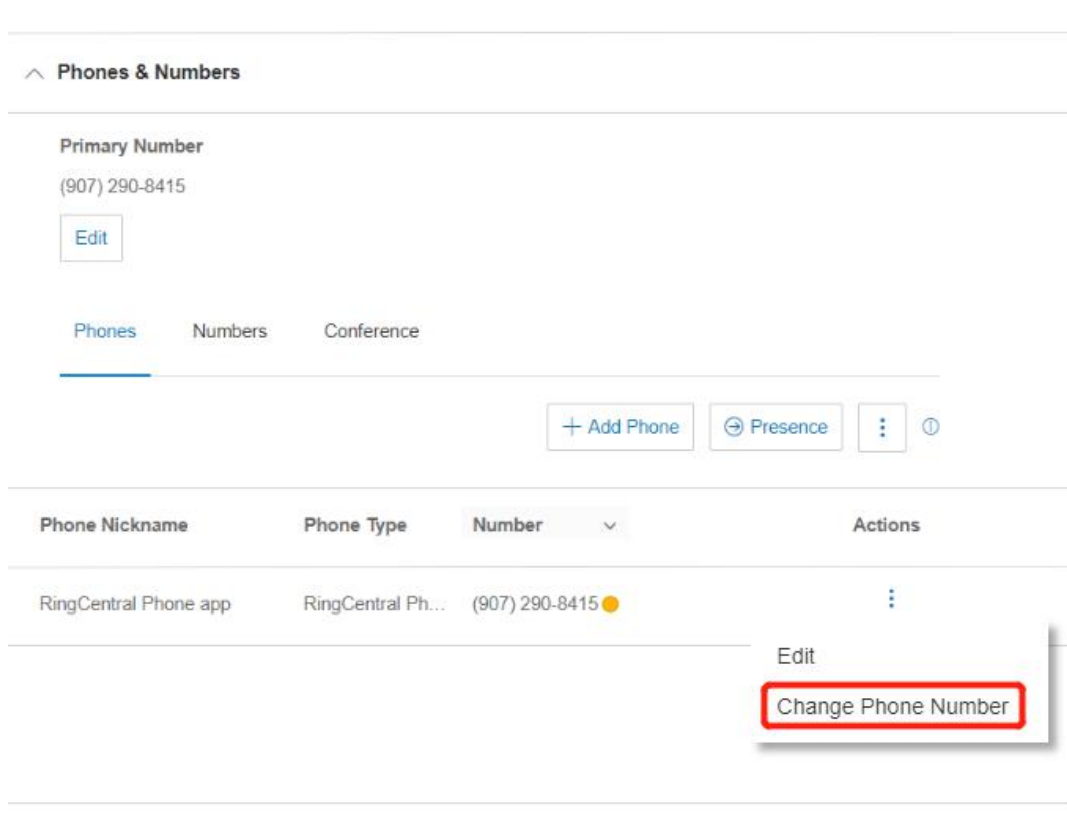
Next

Notification Sending Confirmation

Can't use Phone Number Change in Direct Number.

Close

2.Add 'Change Phone Number' button in Admin Portal > Users > User List > Users with Extensions > User List > User Detailed Page > Phones & Numbers > Phone List> Actions Column, by clicking this button, admin will be directed to Admin Portal >Phone System > Phones & Device > User Phones > Device Detailed Page > Edit Number Function. Details are as follows:



Scope

Service Web

Confirmation pop-up of send notification email after reassign is done

Type: User Story

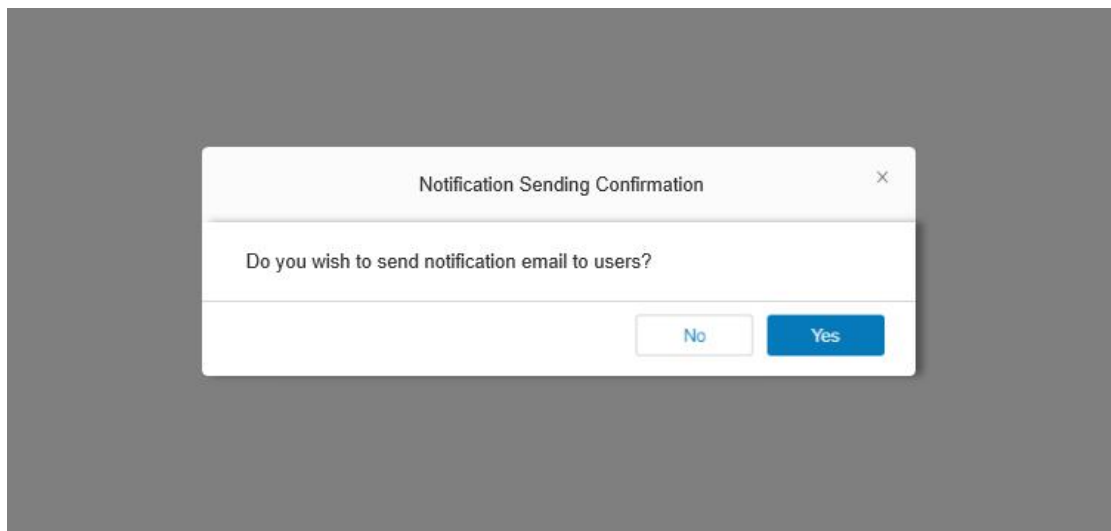
Priority: Normal

Description

Requirement

As an admin, I want to let users know what have been changed after I reassigned the phone number.

1. Add 'Send Notification' confirmation pop-up in Admin Portal >Phone System > Phones & Device > User Phones > Device Detailed Page > Edit Number Function. Details are as follows:



2. After finishing Edit Number, a 'Send Notification' confirmation will pop-up and inform the admin whether to send a notification email.
3. Notification email template's details are as follows:



Welcome

Dear Alex Li,

ForDemo1 Only has Changed your direct line in the RingCentral business phone system.

- Your company number is: (650) 666-0387
- Your extension number is: 12
- Your direct line is: (907) 290-8415
- Your email address for login is: 772734743@qq.com

Scope

Service Web