

USER PORTAL APP



What Is User Portal App?

User Portal is a web and mobile application that allows users to access basic functions of their office phones easily from everywhere.

Who Uses User Portal App?

Anyone who is using Kazoo Business Phone System.

- 1) Mainly business employees who don't have access to their physical phones.
- 2) Web-savy users (Softphoen users, call centre agents) manage their phone from **the web-browser**.
- 3) People on-the-go would prefer to access office phone from **mobile app**. (See mobile app specs.)

How This App Is Useful?

IP phones come with many functionality but they are often hard to use for the end- users.

This easy-to-use web UI allows user to

- 1) View call logs, office directory, assigned devices and numbers
- 2) Manage voice messages and features like call forwarding, find-me follow-me, call recording etc.
- 3) Dial or receive phone calls via integrated softphone or a browser phone.

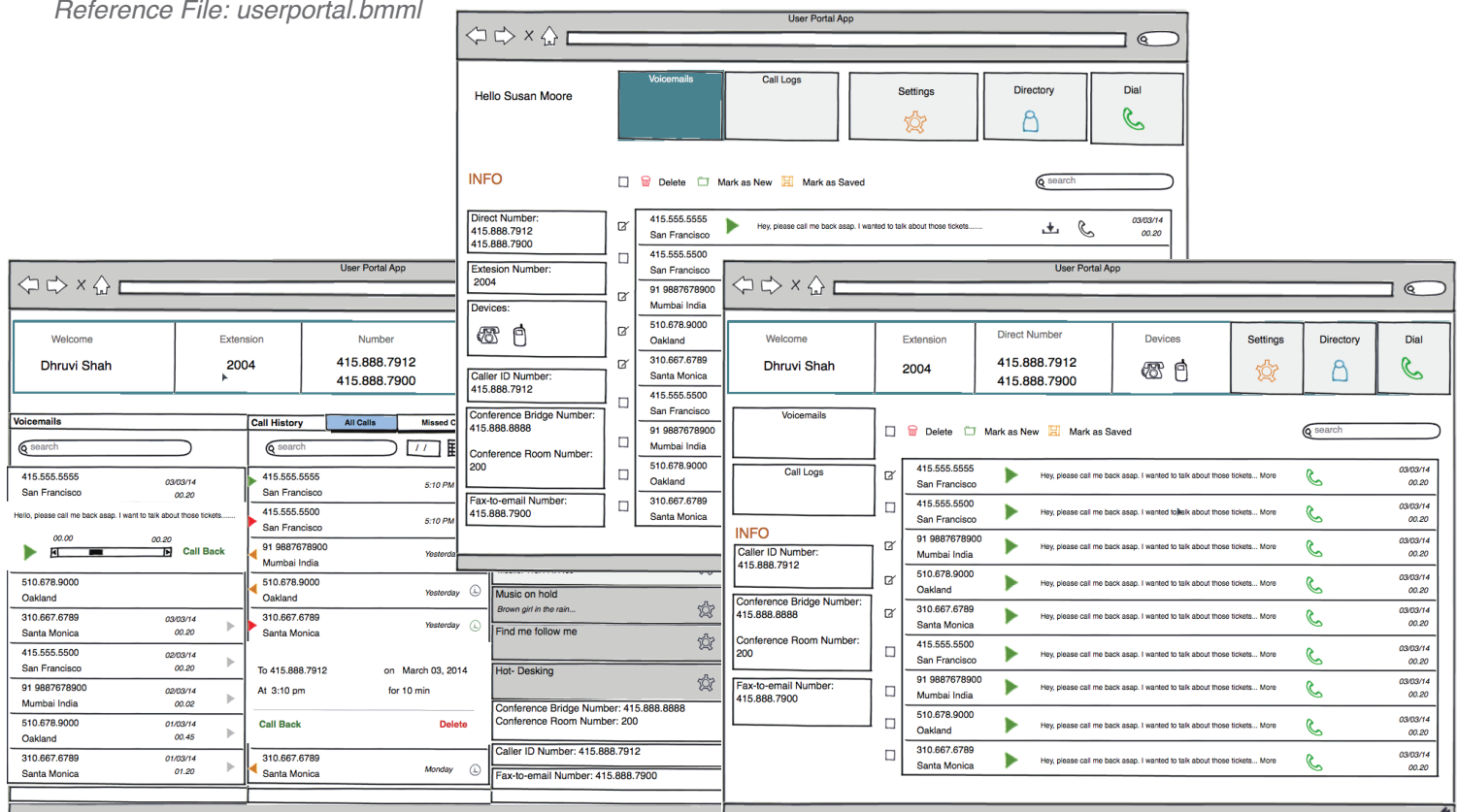
User Interface & Experience Description

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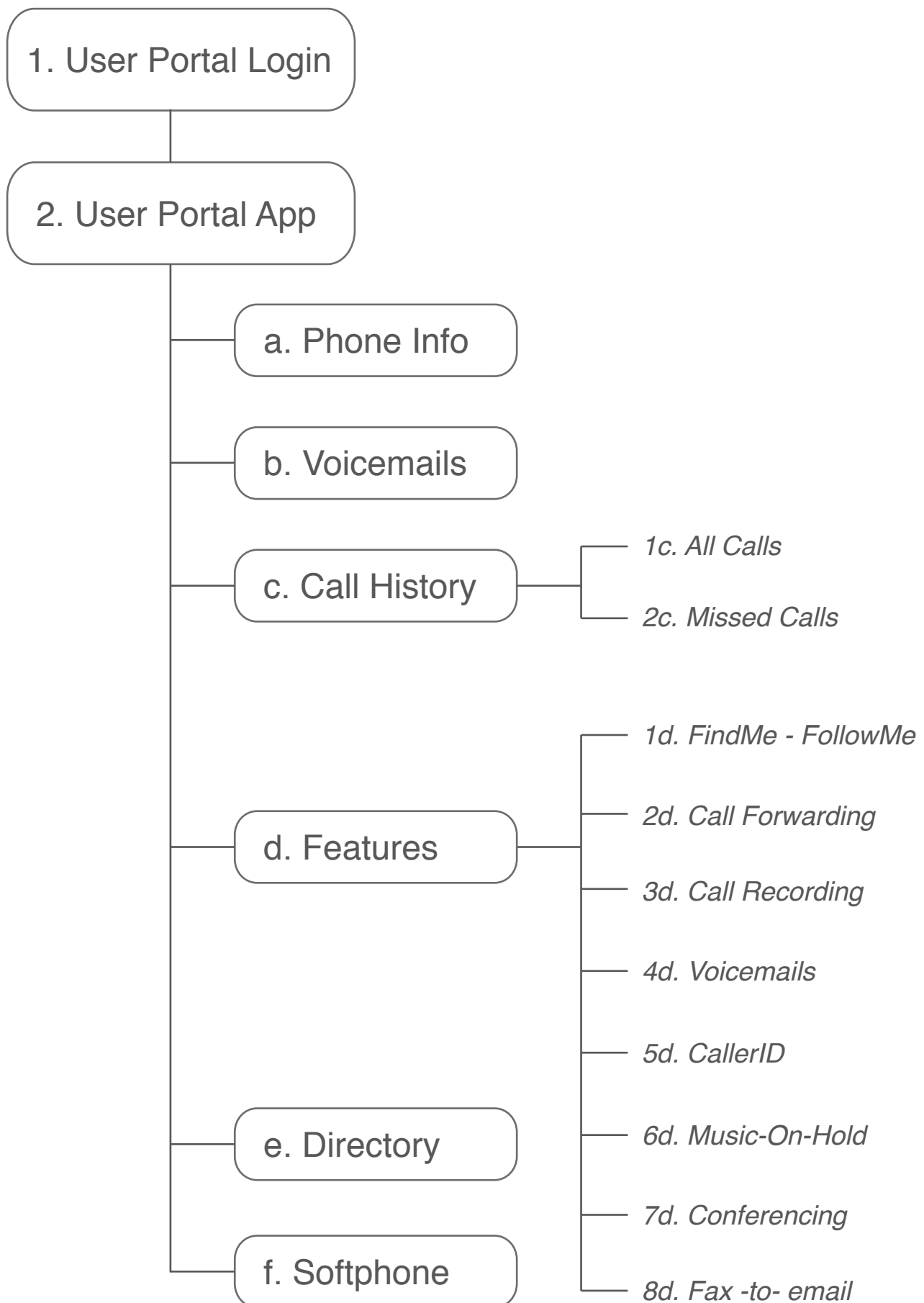
Version Information

Version 1.0

Information & Design December 14, 2013

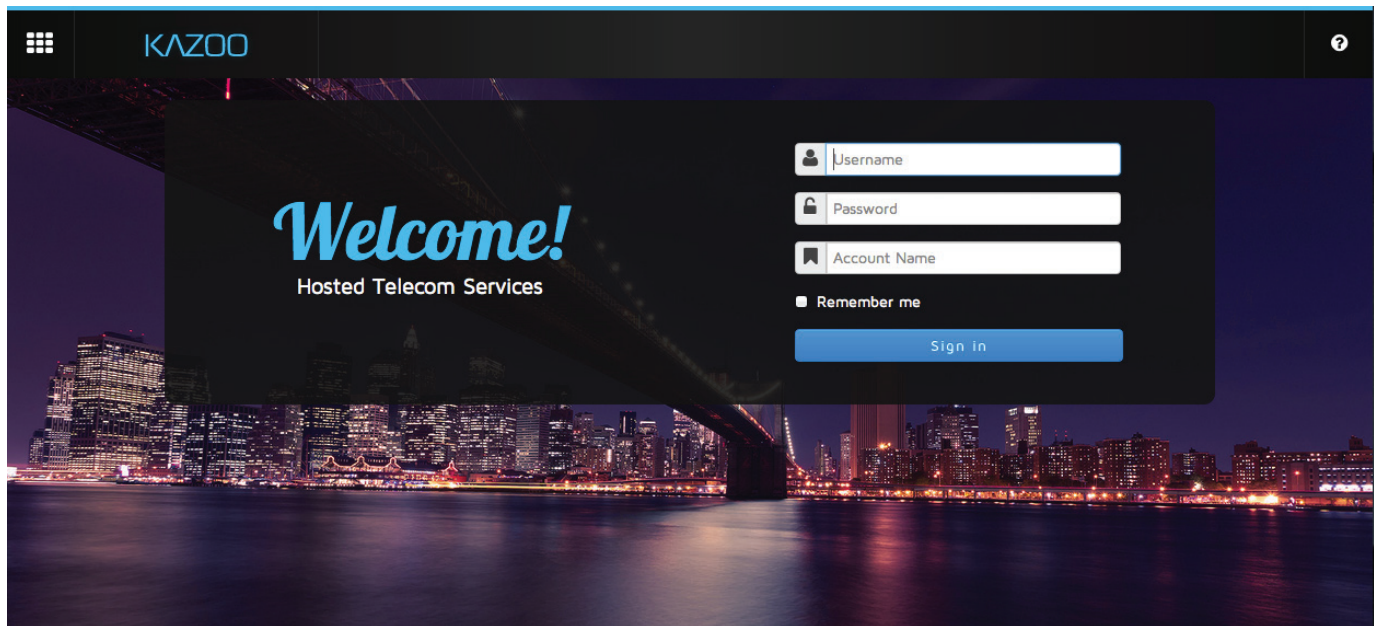


Structure and Navigation



There are 6 primary elements in the app, and each of these may be accessed directly from the main page

User Portal Login



- 1) User can login from the Kazoo UI
- 2) User can login via 3rd party white labelled log-in page.
- 3) Users should be able to download User Portal Tray Icon to their computer. User can directly access user portal just by clicking at the tray icon (without logging in.)

Issues and Assumptions for the User Portal Tray Icon

How and from where user can download Tray Icon?

Users do not need to login ever if they try to access User Portal via Tray Icon.

Users may need to login if they have not user the app from past 15 days

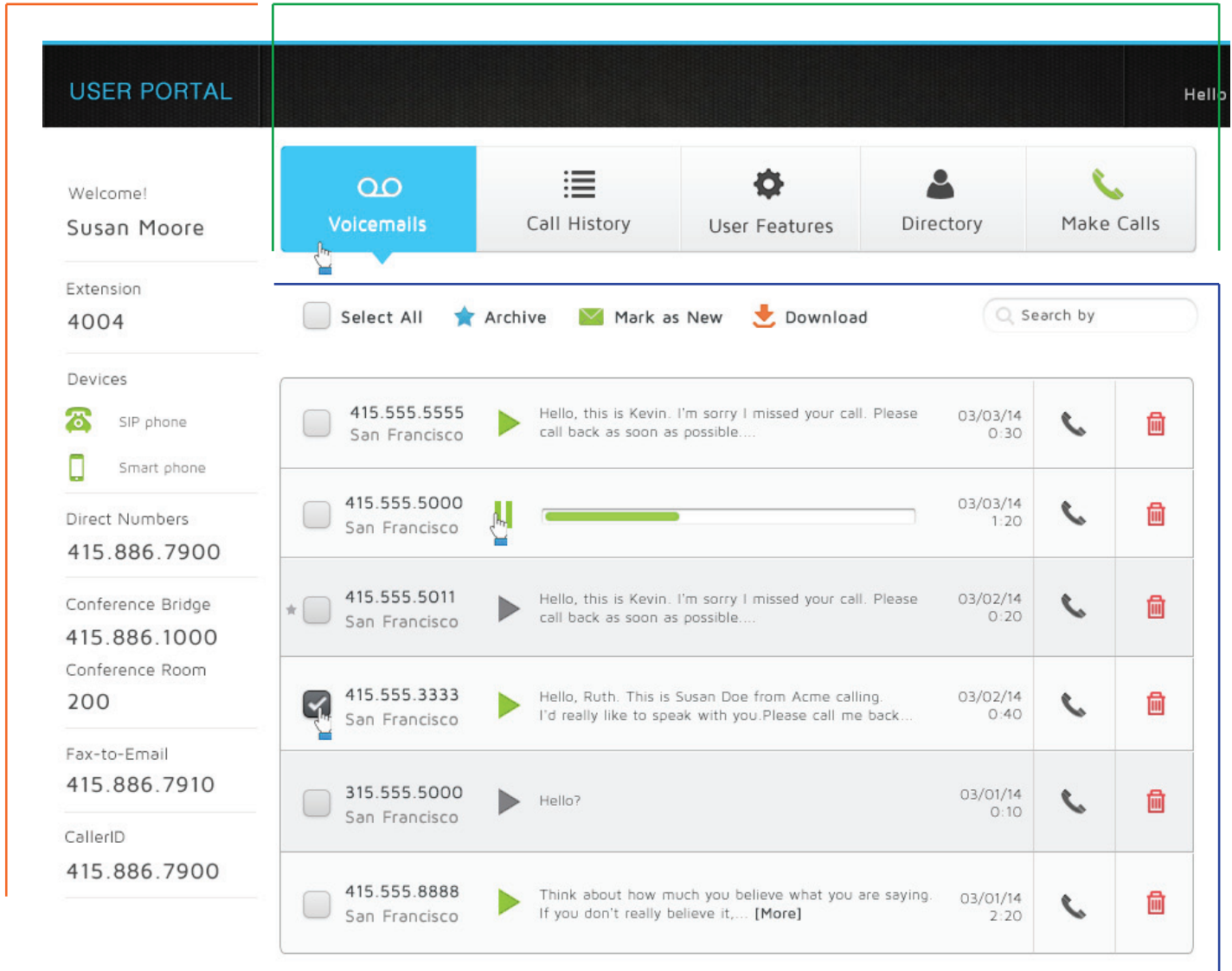
If users need to login then...

Do they see white labelled URL? or Kazoo URL? or something else?

Main Page Description

Static Info

Navigation



The screenshot displays the 2600hz User Portal interface. On the left, under 'Static Info', user details for Susan Moore (Extension 4004) are listed. The top navigation bar includes links for Voicemails, Call History, User Features, Directory, and Make Calls. The main content area, titled 'Page Content', shows a list of voicemails with details such as sender, message preview, date, and time.

Select	Sender	Message Preview	Date	Time	Call	Delete
<input type="checkbox"/>	415.555.5555 San Francisco	Hello, this is Kevin. I'm sorry I missed your call. Please call back as soon as possible....	03/03/14	0:30		
<input type="checkbox"/>	415.555.5000 San Francisco		03/03/14	1:20		
<input checked="" type="checkbox"/>	415.555.5011 San Francisco	Hello, this is Kevin. I'm sorry I missed your call. Please call back as soon as possible....	03/02/14	0:20		
<input checked="" type="checkbox"/>	415.555.3333 San Francisco	Hello, Ruth. This is Susan Doe from Acme calling. I'd really like to speak with you. Please call me back....	03/02/14	0:40		
<input type="checkbox"/>	315.555.5000 San Francisco	Hello?	03/01/14	0:10		
<input type="checkbox"/>	415.555.8888 San Francisco	Think about how much you believe what you are saying. If you don't really believe it,... [More]	03/01/14	2:20		

Page Content

Primary navigation is provided on the top of the screen, in a horizontal list of graphical links.

Main phone information stays constant on the left side, in a vertical list.

Page content is on the centre and it changes based on active navigation.

Users may use this app to check (info, voicemails, call logs, office directory, settings or call)

Experience (Issue) : User may want to forward calls or change FindmeFollowme very often which is hidden and 2 clicks away from the main navigation.

Notes:

Please observe user behaviour, add analytics to learn what users do the most on this screen and improve the design accordingly.

a. Phone Info

Description:

Phone information panel displays all the numbers and devices assigned to the user.

Note: This panel has a scope of improvement from the user's feedback. Hierarchy of the information could be arranged differently.

Interaction:

This is a static information and thus there are no user interactions.

Real Time Update:

Update this information real time. For eg. If user's device is unregistered then change the device icon color to red.

d. Features

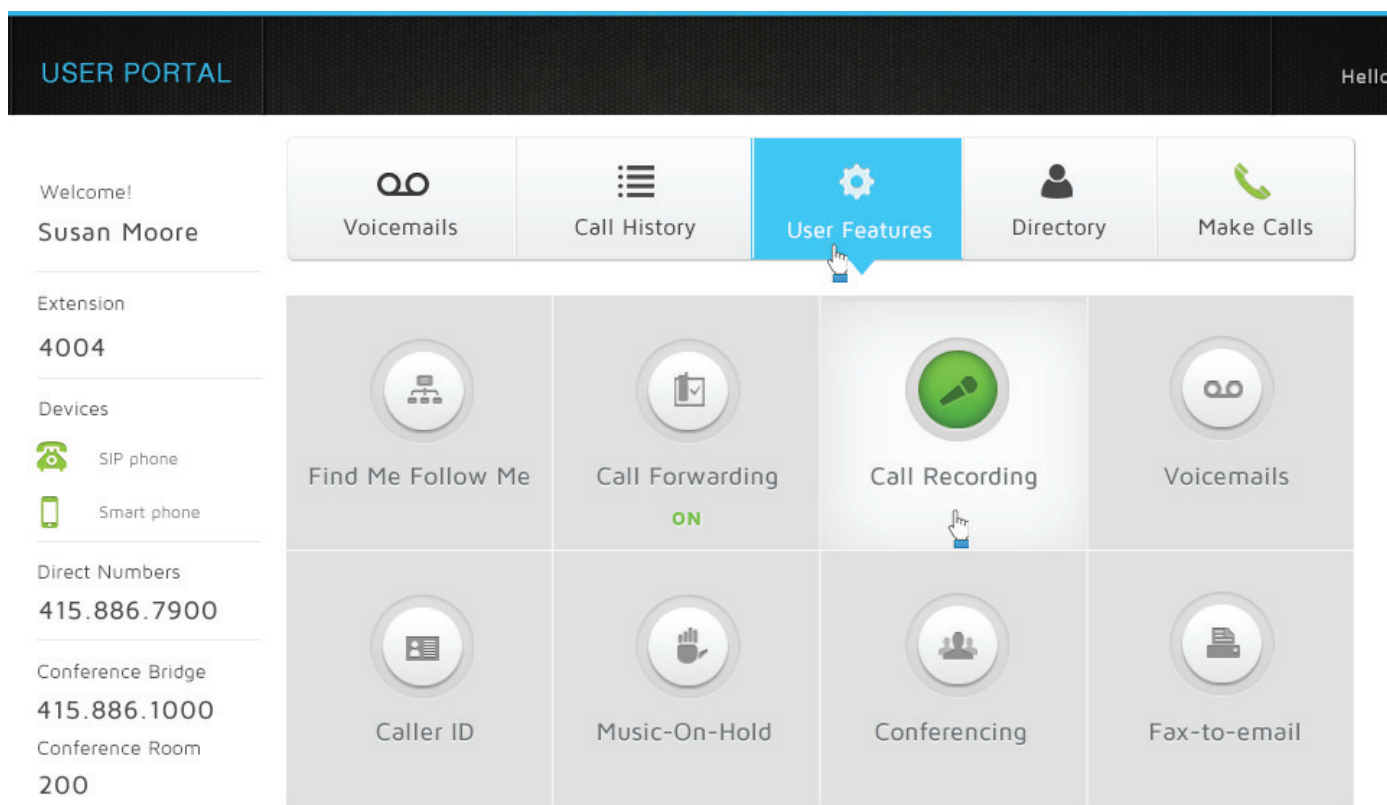
Description:

User features are the advanced settings of the user's phone. Visibility of the user features depend upon the permission granted to the user. User may do the following.

- 1) Forward call to another number
 - 2) Ring multiple devices at the time or set order
 - 3) Add music while the phone on hold
 - 4) Record Calls
 - 5) Change conferencing PIN at anytime
- & MORE

Important Note:

These features are already built as a Common-control. They should be integrated with Smart PBX. Please review Smart PBX to produce this page.




















The screenshot displays the 'USER PORTAL' interface. On the left, a sidebar contains user information for Susan Moore (Extension 4004) and lists her devices (SIP phone and Smart phone) along with direct numbers and conference bridge details. The main area features a top navigation bar with icons for Voicemails, Call History, User Features (highlighted in blue), Directory, and Make Calls. Below this is a grid of feature tiles: Find Me Follow Me, Call Forwarding (marked ON), Call Recording (highlighted with a hand cursor), Voicemails, Caller ID, Music-On-Hold, Conferencing, and Fax-to-email.

b. Voicemails

Description:

Voicemail is one of the important feature for the user. This tab is activated by default unless user navigate away. User should be able to

- 1) Quickly read the transcription
- 2) Listen to voicemails
- 3) Archive it, delete it, download it, mark it as new
- 4) Call back to the number

	415.555.5555 San Francisco		Hello, this is Kevin. I'm sorry I missed your call. Please call back as soon as possible....	03/03/14 0:30		
	415.555.5000 San Francisco			03/03/14 1:20		
	415.555.5011 San Francisco		Hello, this is Kevin. I'm sorry I missed your call. Please call back as soon as possible....	03/02/14 0:20		
	415.555.3333 San Francisco		Hello, Ruth. This is Susan Doe from Acme calling. I'd really like to speak with you. Please call me back....	03/02/14 0:40		

Interaction:

Audio Player

When user play voicemail, a player overwrites the transcription

When user stop voicemail, transcription appears again (There is no pause action)

When user play again, start the voicemail from the beginning

User should be able to rewind and forward voicemail by moving the cursor on the player

Transcription

If transcription is long then end it with a link [... Read More]

Allow user to click on transcription to see complete transcription by expanding that row.

Add [Read Less] link at the end of the transcription.

Pending visual design mock-up

b. Voicemails

Interaction:

Delete

Allow one click delete

If the voicemail is marked as Archive then show confirmation pop-up “This voicemail is marked as archive, are you sure you want to delete” (See common control pop-ups)

Call

Click on phone icon to call back on voicemail number.

*This action opens an integrated soft phone which allows user to control a call.

(See tech doc to learn how integration works)

Selection

Once user select voicemails, action navigation appears on top of the list

User can then archive it, delete it, download it, mark it as new

Search

Allow user to search by name and number (by date- optional., - see technical doc-)

Navigation:

When there is no voicemail selected, hide all the actions. (Just keep select all and search tab)

This is an universal selection behaviour. (You can refer the behaviour on PBX connector)

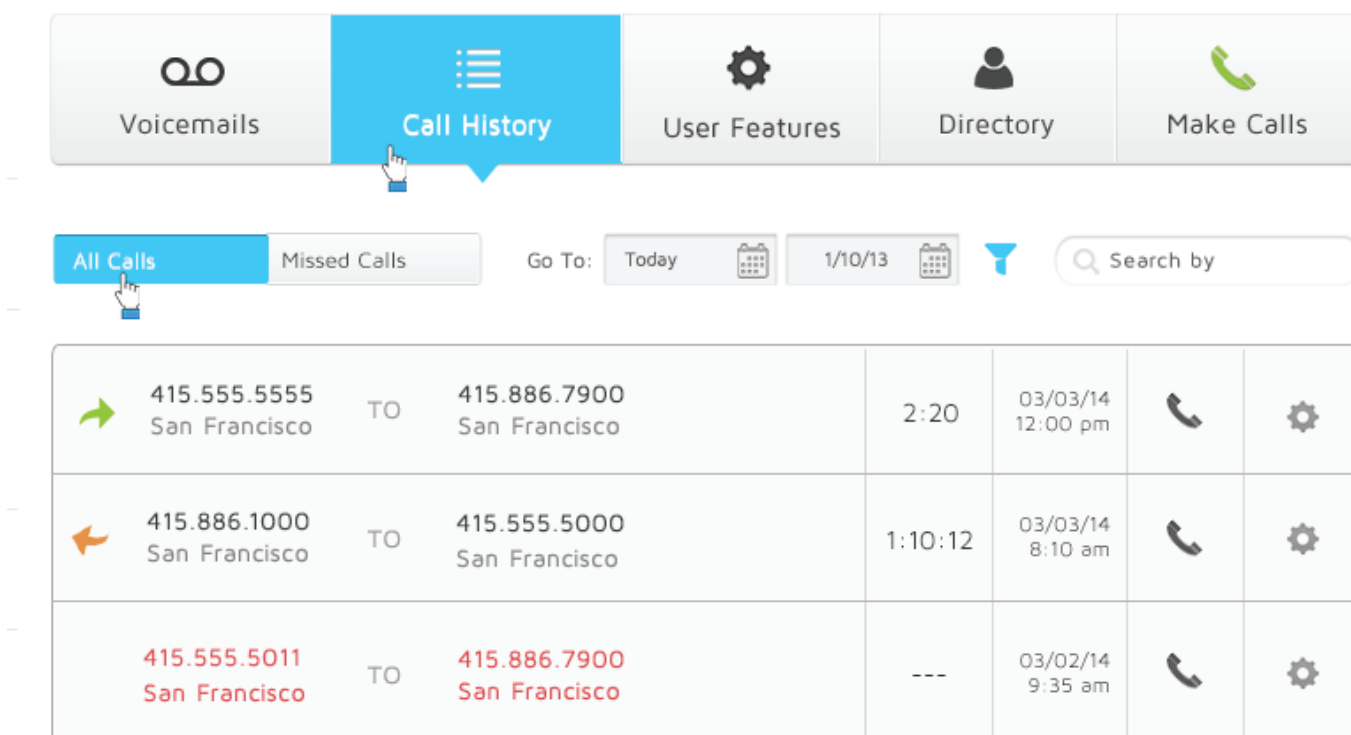
<div> <input type="checkbox"/> Select All <input checked="" type="checkbox"/> Archive <input checked="" type="checkbox"/> Mark as New <input checked="" type="checkbox"/> Download <input type="text" value="Search by"/> </div>					
<input type="checkbox"/>	415.555.5555 San Francisco		Hello, this is Kevin. I'm sorry I missed your call. Please call back as soon as possible....	03/03/14 0:30	
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<input checked="" type="checkbox"/>	415.555.3333 San Francisco		Hello, Ruth. This is Susan Doe from Acme calling. I'd really like to speak with you. Please call me back...	03/02/14 0:40	

c. Call History









Description:

Call history allows user to check phone call history for any calls they made, received or missed. (See your mobile phone call history/log)

- 1) User can toggle between all calls and missed calls
- 2) User can filter history by date
- 3) User can search calls by name or number
- 4) User can call back to the number
- 5) User can view call details & report a call



The UI mockup shows a navigation bar with five items: Voicemails, Call History (selected), User Features, Directory, and Make Calls. Below the navigation bar, there are two tabs: All Calls (selected) and Missed Calls. To the right of the tabs is a 'Go To:' section with 'Today' and '1/10/13' options, a filter icon, and a search bar labeled 'Search by'. The main content area displays a table of call history entries.

	415.555.5555 San Francisco	TO	415.886.7900 San Francisco	2:20	03/03/14 12:00 pm		
	415.886.1000 San Francisco	TO	415.555.5000 San Francisco	1:10:12	03/03/14 8:10 am		
	415.555.5011 San Francisco	TO	415.886.7900 San Francisco	---	03/02/14 9:35 am		

Interaction:

Call

See previous page (b. Voicemails)

Settings

On-click, open a pop-up showing technical details of the call. [See technical specs]

Pending visual design mockup for setting screen.