
Unified Office TCN Service Management Suite Deployment Guide

Thank you for your interest in the Unified Office Total Connect Now Service Management Suite (TCNSMS). This guide has been created to assist in the deployment and use of the TCNSMS solution. Before proceeding with the deployment, please be sure to verify that the following prerequisites are in place;

- A TCN system has been installed at the customer location.
- The TCN will need to be configured with the appropriate networking configuration.
- The TCN must have the most current software with crontab and API version 1.6.
- The customer must have a user account with username/password with security level of API User resource.
- Users must be setup with a TCN User account and VM password with access to the Operator (Virtual Communication Console) URL - <https://TCNNAME.uotcn.net/tcnautotask/operator/>

Document History

Document Version	Date	Revision Summary	Author
1.0	9-Jan-2020	Initial	Mark Batchelder

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Step 1.

Verify Users who will be using TCNSMS has a valid extension and voicemail PIN by logging into the TCN. You must have an administrator with proper credentials to log into that admin portal.

Step 2.

Navigate to the extension tab and select any users that will be using TCNSMS and confirm they have an extension and voicemail PIN.

Extension	Name	Email	Caller ID	Record Always	
				Inbound	Outbound
201	Manager			<input type="checkbox"/>	<input type="checkbox"/>
202	Hygenist	pete.lebet@unifiedoffice.com		<input type="checkbox"/>	<input type="checkbox"/>
203	Labs		Tom Phelan <6033731508>	<input type="checkbox"/>	<input type="checkbox"/>
205	Office Manager	jim.huang@unifiedoffice.com	reception-test <6033191239>	<input type="checkbox"/>	<input type="checkbox"/>
207	JimHome T42	jim.huang@unifiedoffice.com	Reception Test <9787430023>	<input type="checkbox"/>	<input type="checkbox"/>
301	Doctors Office	pete.lebet@unifiedoffice.com		<input type="checkbox"/>	<input type="checkbox"/>
302	Lounge	pete.lebet@unifiedoffice.com		<input type="checkbox"/>	<input type="checkbox"/>
401	Operator 1	pete.lebet@unifiedoffice.com		<input type="checkbox"/>	<input type="checkbox"/>
402	Operator 2	pete.lebet@unifiedoffice.com		<input type="checkbox"/>	<input type="checkbox"/>
403	Operator 3	pete.lebet@unifiedoffice.com		<input type="checkbox"/>	<input type="checkbox"/>

Step 3.

Click on the extension of the user and confirm they are setup with a voicemail PIN.



The screenshot shows the Unified Office Admin Portal interface. The top navigation bar includes the logo, user name 'Mark Batchelder', and a 'reception2' indicator. The main menu has options for Status, Groups, Extensions, Settings, Reports, Call Flows, TCNDMS, and TCNHCX. The 'Configure x401' dialog box is open, displaying the following configuration details:

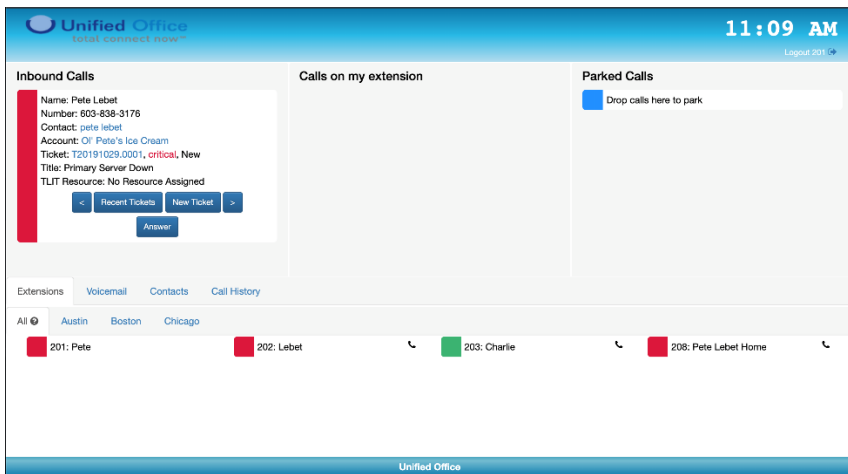
Extension	401
Name	Operatory 1
Email	pete.lebel@unifiedoffice.com
Caller ID	Name <number>
Voicemail	PIN 1234

List of Autotask integration features with TCNSMS and Virtual Communications Console.

- Inbound Caller ID with Name presented to Customer Service Agent
- Inbound Autotask information presented to Customer Service Agent (Account, Contact, Most Recent Ticket with status, priority level and internal resource assigned to ticket)
- Drag and Drop caller to another extension or to a park zone
- One Click transfer or park
- One click access to Autotask Account, Contact or Ticket
- Scroll through open tickets
- One click access to view all open tickets
- One click access to open a new Autotask ticket
- Autotask contact list with search options and click to dial
- Call History with search options and click to dial

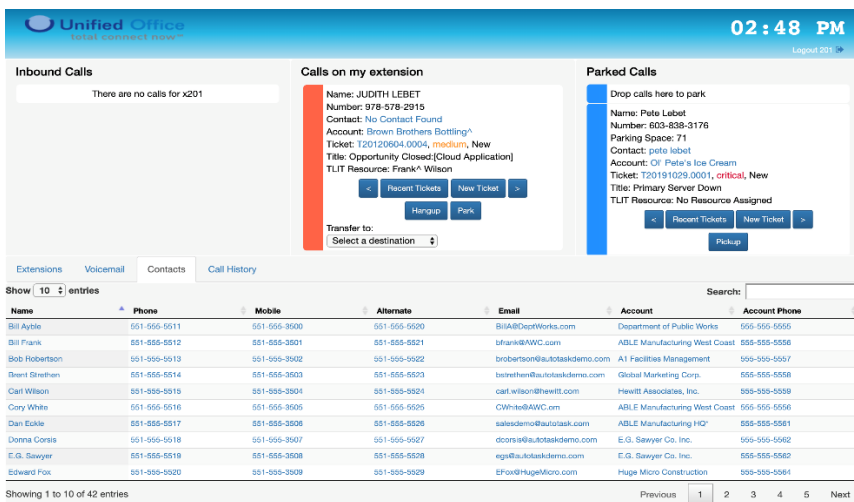
Incoming Call Example.

Caller ID and Autotask information provided on incoming call.



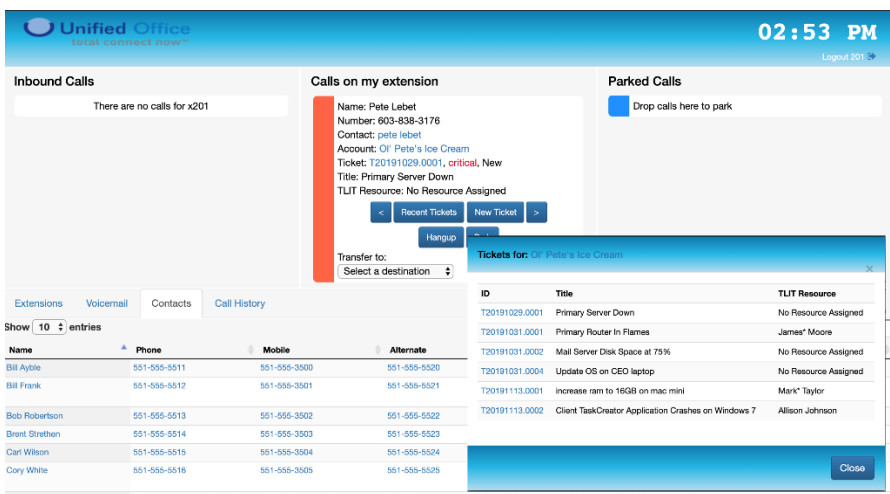
Active Call and Parked Call with Contact list example.

Caller ID and Autotask information retained while managing a call or on a parked call.



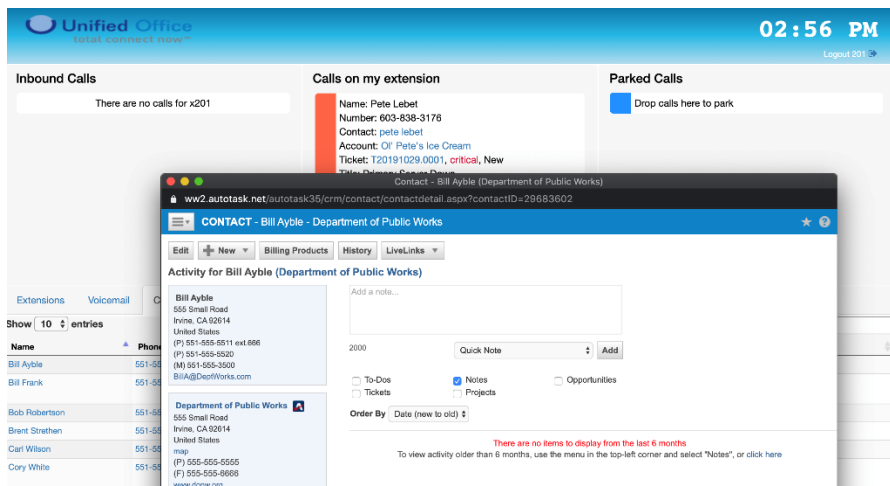
Viewing all Recent Tickets within Autotask example.

When managing calls easily access the accounts recent tickets.



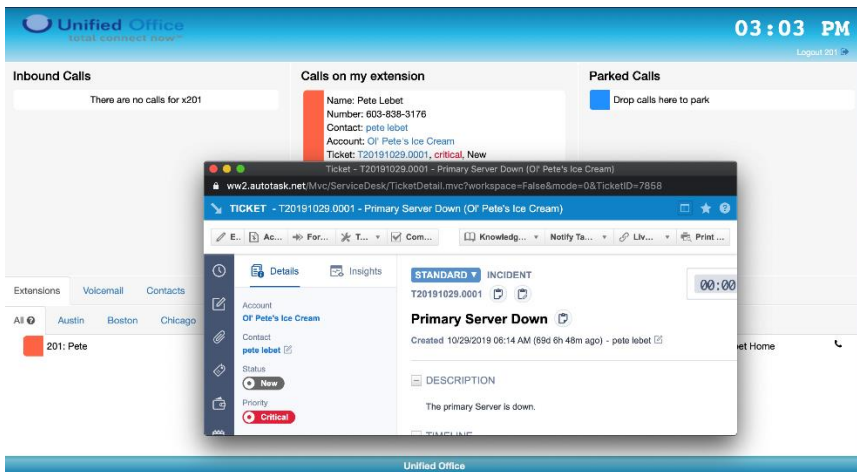
Autotask Contact List tab and Contact Record Open example.

View Autotask contacts and with search options and click to open contact in Autotask.



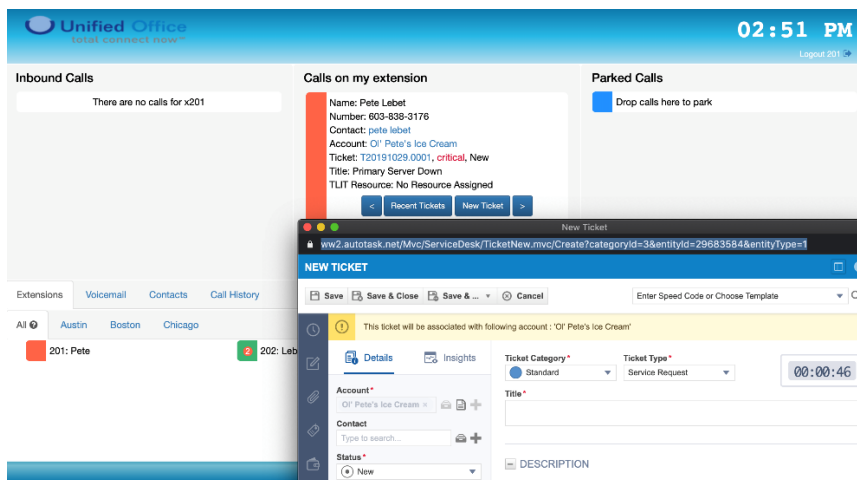
Autotask Ticket Window example.

Click a ticket number shown within the VCC window and open the ticket within Autotask.



Create a New Ticket in Autotask while speaking with the customer.

Easily open a new ticket by clicking the New Ticket button while on an active call.



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