

STCM Customer Fields

What are the Custom Fields?

Custom Fields can be used, for a customer to add contextual details to their numbers, to aid usability and management of the numbers and various aspects of the service including call plan management or statistic reporting.

For example, if you have lots of numbers on your account, you could add; user info, site info, department or function info etc. etc.

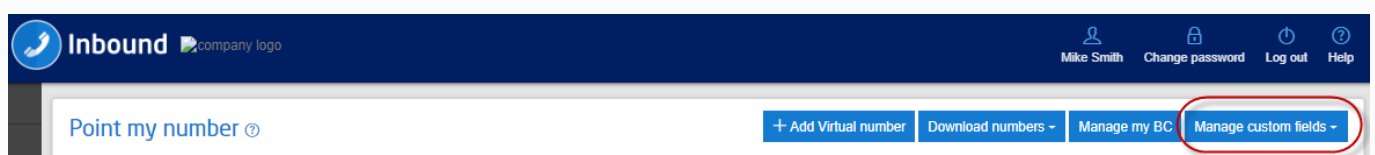
This data will then be presented in your statistic reports to allow you to produce meaningful performance reporting.

Creating Custom Fields

Your profile will need to have access to the Advanced Statistics and Point my Number section to gain access to the Custom Fields.

Log into the portal and go to the 'Point my Number' screen. Here you will see the following two buttons:

Manage Custom Fields allows you add, modify and delete a custom field

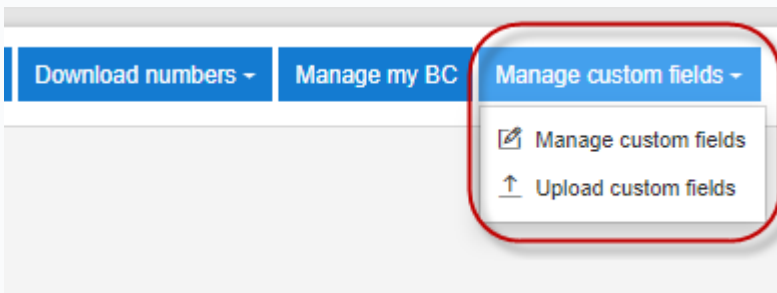


Download Numbers allows you bulk populate the custom field using a CSV template file

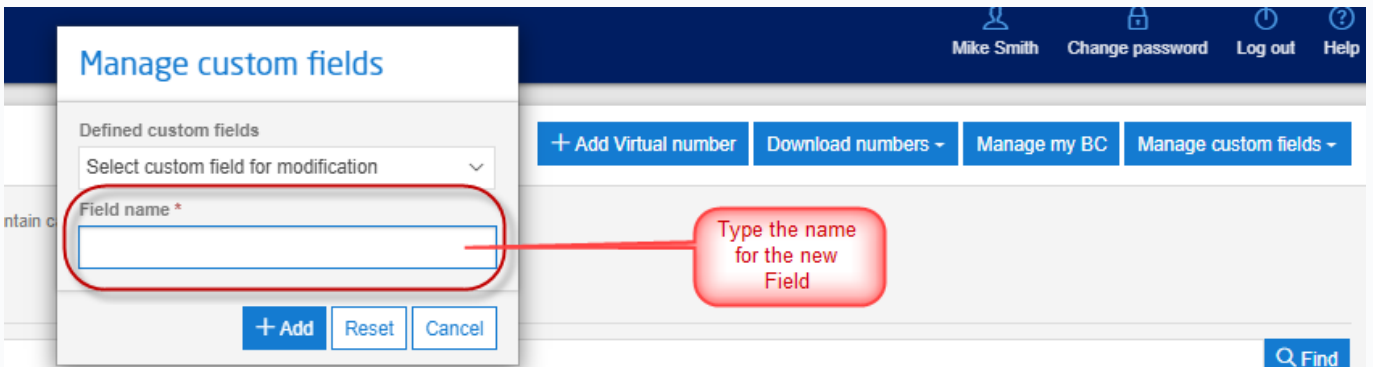


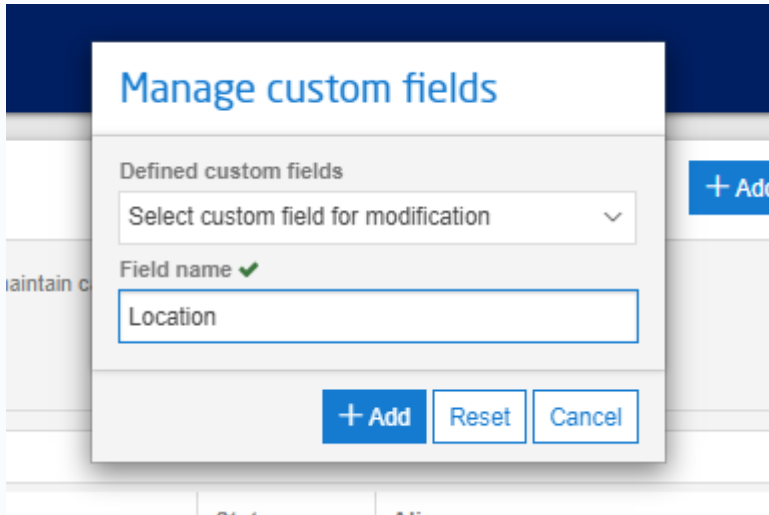
Create a New Custom Field

Select Manage Custom Fields and then select Manage Custom Fields



You will be presented with a dialog box. Enter the name of the new custom field you require and hit add. Once added to the database the Field name box will clear and you can enter further custom fields.





Please note it's important that you plan the sequence in which you want to view the columns as they will be added to the point my number screen in the order in which you create them.

Point my number

[+ Add Virtual number](#) [Download numbers](#) [Manage my BC](#) [Manage custom fields](#)

Welcome to Point my number. Here you can create and maintain call routing plans for your Inbound number(s). Please select a number from the list below.

[All Inbound numbers](#) [Only Virtual numbers](#)

Search inbound numbers [Find](#)

	Description	Status	Aliases	Dealer ID	Brand	Site	Mike	Test	Test 3	Location	
i046	Test Number 1	Active	No alias make primary , make aliased	Top Dealer 1	Best Brand 1	Site 1					
i402	HMR Test	Active	No alias make primary , make aliased	Top Dealer 2	Best Brand 1	Site 2					
i403	Sales Green	Aliased Active	Alias of 01339720096 change , remove	Top Dealer 3	Best Brand 3	Site 3					

You can now go ahead and populate the field/s as required

How to Add or Edit Data for Individual Numbers in a Custom Field

Click on the Pencil icon and then enter the information as free text on a field-by-field basis.

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Search inbound numbers

Find

	Description	Status	Aliases	Dealer ID	Brand	Site	Mike	Test	Test 3	Location
046	Test Number 1	Active	No alias make primary , make aliased	Top Dealer 1	Best Brand 1	Site 1				
402	HMR Test	Active	No alias make primary , make aliased	Top Dealer 2	Best Brand 1	Site 2				
403	Sales Green	Aliased Active	Alias of 01339720096 change , remove	Top Dealer 3	Best Brand 3	Site 3				

Modify inbound number

Number: 01158965046

Description: Test Number 1

Dealer ID: Top Dealer 1

Brand: Best Brand 1

Site: Site 1

Mike:

Test:

Test 3:

Location: South West

Save Cancel

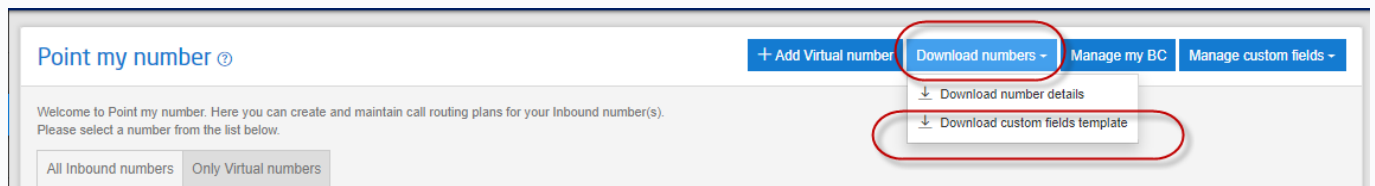
Click Save when completed, and the data will now be visible in the field.

										Find
est	Test 3	Location								
		South West								

How to Edit Data in Bulk

Download the Template

You can download a CSV template by selecting the Download Numbers option, on the Point My Number tab. The below pop-up box will appear and from the drop down select “Download custom fields template”.



This will download a CSV file that contains all of the numbers on the account and current Custom Fields column headers.

Please note: The header fields MUST not be modified, you can not add or delete fields on the CSV template, that should be done, using the method described above.

If you need use V-LOOKUP other for any reason temporarily add columns to import or match data, you should ensure to delete and return the columns/fields back to their original state when you are ready to upload, or the upload will fail.

Follow the next steps to populate the template.

Update the Excel Number Formatting

When you open the CSV file within Excel you will need to change the default data formatting for the Inbound number. The number field will be in e.164 format and will need to be changed to Number format before uploading back to the platform. See below example:

	A	B	C	D	E	F	G	H	I	J
1	Inbound number	Forename	Surname	Department	Location					
2	4.41461E+11	Roy	Farrow	Product	Newbury					
3	4.41465E+11									
4	4.42071E+11									
5	4.42071E+11									
6	4.43335E+11									

Highlight the entire Inbound Number column and change the format from General to Number, then remove the decimal places as below.

	A	B	C	D	E	F	G	H	I	J
1	Inbound number	Forename	Surname	Department	Location					
2	441461234567	Roy	Farrow	Product	Newbury					
3	441464631985									
4	442071011010									
5	442071011234									
6	443334567890									

Add or Edit Your Data

Populate the required fields with the relevant data.

Tip! Any unchanged data will be preserved. You can also populate the Description field also.

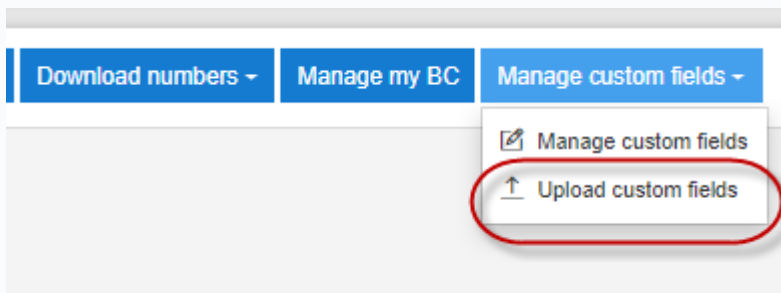
The template does not need to contain all the numbers when uploaded, so if you want to delete any that are not currently in scope to be edited/updated, you can delete the respective rows.

A	B	C	D	E
Inbound number	Forename	Surname	Department	Location
441461234567	Roy	Farrow	Product	Newbury
441464631985	Mike	Smith	Pre-Sales	London
442071011010	Dave	Barker	Specialist	Manchester
442071011234	Spare			
443334567890	Spare			

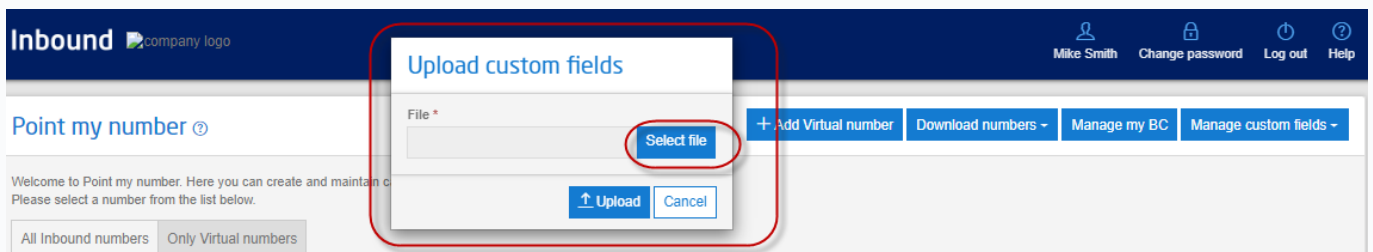
Save the spreadsheet, where you will be able to locate it to complete the upload. Ensure you save it in CSV format.

Upload Your New Data

Return to the Portal “Point my number tab” and select Manage Custom Fields > Upload custom fields



The following dialog box will be displayed.



Navigate to the location you previously saved the file, using the Select file button, select the file and click Upload.

The new data will now be uploaded to the Custom Fields.

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Search inbound numbers [Find](#)

Number	Description	Status	Aliases	Dealer ID	Brand	Site	Location	
01158965046	Test Number 1	Active	No alias make primary , make aliased	Top Dealer 1	Best Brand 1	Site 1	South West	
01162168402	HMR Test	Active	No alias make primary , make aliased	Top Dealer 2	Best Brand 1	Site 2	North East	
01162168403	Sales Green	Aliased Active	Alias of 01339720096 change , remove	Top Dealer 3	Best Brand 3	Site 3	West	
01339720096	Mike Test Number (Nigel currently using)	Active	Has aliases change	Top Dealer 4	Best Brand 4	Site 4	North	
02036671362	TW Voicemail number - DO NOT REMOVE	Active	No alias make primary , make aliased	Top Dealer 5	Best Brand 5	Site 5	South	

Dataset Use

The Custom Fields data will then appear in any Advanced Statistic or Push Reports going forward.

How to Use the Custom Fields to Search and Filter Results

The data within the custom fields can also be used to search and filter number results on the following tabs on the portal:

Tip! The percentage % sign can be used as a 'wild card' before or after a search/find term.

Portal Tab	Use Case
Welcome tab - Find field	Quickly and accurately find numbers to make changes to.
Point my Number - Find field	Quickly and accurately find numbers to make changes to.
Point my Number > Manage my BC - Find field	Quickly find a group of numbers that you want to invoke for Business Continuity
Listen to my calls - Multiple Number Selection	Search for recordings on groups of numbers.
Voicemail tab - Multiple Number Selection	Search for voicemails on groups of numbers

Performance - Multiple Number Selection	See stats for a selection of numbers
Advanced Statistics - Multiple Number Selection	Run stat reports for a selection of numbers.
Event History - Multiple Number Selection	Search for change events on a group of numbers.
Administration > User > Inbound Numbers > Available - Find field	Allocate a group or subset of numbers to a user
LCA Limit - Multiple Number Selection	Apply the same LCA limit to a group of numbers.
Goto Groups > +Create Goto Group > Add Find field	Find a specific number to create a Goto group for.