

# Cloud Services Portal

## Admin Guide

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## Introduction

This guide is a convenient, go-to resource for Administrators getting started with the **Cloud Services Portal** to manage voice communications accounts and services online. It provides an overview of the application website sections that may be available to various users who access the Portal and offers instructions and tips for setup and maintenance of the communication features and services offered by your telecommunications provider.

We encourage you to take some time to review this document and keep it handy for future reference. Should you need further assistance, please reach out to us. We are always here to help you with fast, courteous, and professional support, and your service provider Account Manager can assist with requests for free additional training should you wish.

It is important to note that this document describes features that can be enabled and made available by the provider or the organization. Some features described here may not be included in your subscription and access may not be granted to all users by your organization. Please contact your organization's Communications Administrator or your supervisor to determine the features and services you should have access to review and manage within the Cloud Services Portal.

### IMPORTANT!

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**The Cloud Services Portal is a permission-based application.**

The application's provider defines the initial activation and service level of the portal for all end users and Administrators. This includes the sections that will be made available to users working within it, and any customizations to the style or branding.

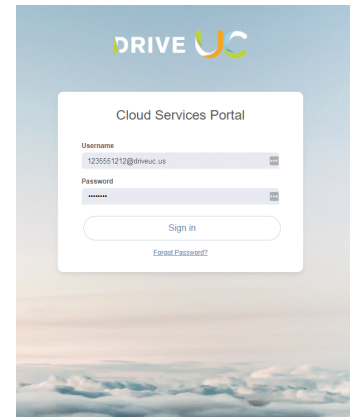
Super-Administrator level access to work in the *Realtime Provisioning Explorer* (RPX) application is required to complete the activation and customization tasks for the Cloud Services Portal.

Contact this application's provider for assistance or more information.

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## Portal Access

The Service Provider offers an intuitive online Cloud Services Portal that makes it easy for Administrators to manage enterprise and/or subscriber account features and settings online. Although it is currently *optimized for desktop usage*, the portal is accessible from any Internet-enabled device – even tablets or smartphones –so you can manage your services, whether you are in the office or on the go. In most cases, your Admin sign in credentials will be sent via email. Contact the service provider for assistance.



## Direct Online Access

1. Open a web browser and enter the URL (web address) provided to you for online account management.

Example: <https://portal.driveuc.com/>

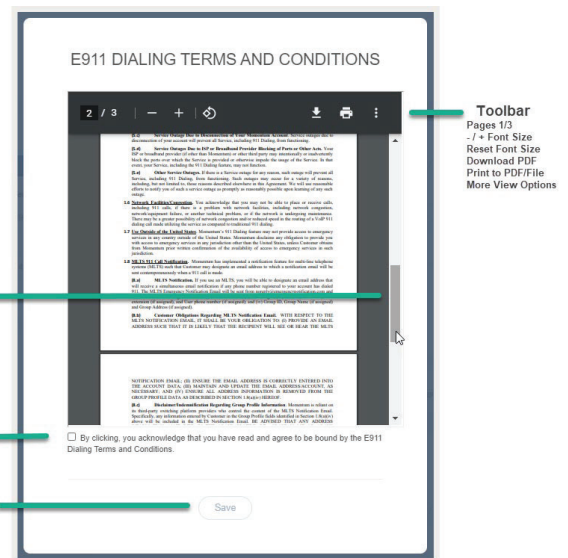
2. Enter the Admin Account Username (xxxxxxxxx@domain.xx format) and Password credentials in the fields provided.
  - ❖ Use the [Forgot Password?](#) link to retrieve your portal sign in credentials whenever necessary.

3. Click the [Sign In](#) button and Cloud Services Portal opens.

During the initial access, a Terms and Conditions dialog displays requiring manual acknowledgment to proceed.

- ✓ Review the document using the tools provided to read or save a copy.
- ✓ Click to place a check in the box to acknowledge and accept the terms and conditions.
- ✓ Click [Save](#) to submit and proceed.

*Note: Once saved, this dialog will not display again unless the Terms and Conditions change.*



## Access Via RPX

(Restricted) Once the Cloud Services Portal access is enabled for an organization, authorized Administrators with RPX access may view and manage the features and services provided to the account from the new Subscriber Portal **Emulation** functionality within RPX. This is similar to the emulation functionality provided by RPX for previous subscriber portal iterations.

1. Log into the Beta Realtime Provisioning Explorer (**RPX**) application.
2. Locate and select the customer account location or group.
3. Click on the **S** (Services) icon or go to the Services tab.
4. Click on the [Group](#) link for an Admin user in the *Subscriber Portal (New)* column.

*The Cloud Services Portal emulation instance opens directly into the **Locations & Groups** view for the group or Enterprise and offers access to the other Administration Tools areas within the portal via the AdminTools menu on the left or the Admin Dashboard.*

After you have signed into the Cloud Services Portal as an Administrator and accepted the Terms and Conditions, the Admin Dashboard and all the tools and features assigned to you to manage communications features or services are right at your fingertips.

## Admin Tools

The Cloud Services Portal provides useful resources for routine Administrator-level tasks. Administrators can sign in and instantly locate account information, setup and manage individual user accounts, define universal settings for Groups or Locations, create and update Auto-Attendants, Hunt Groups, Enterprise Time Schedules, and much more – quickly and easily while working online.

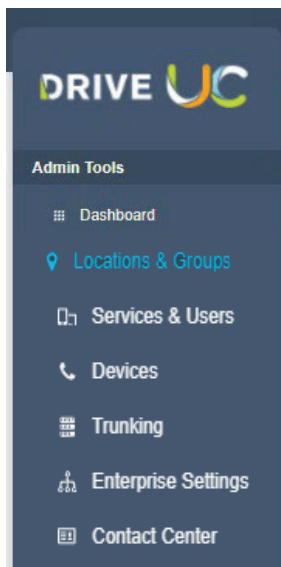
When Administrators log into the portal, they see the **Admin Tools** section of the Menu Panel which provides authorized users with access to manage the organizational settings and services, as well as locate and manage individual accounts within the organization.

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*Security Note: Once logged in, the connection will automatically close if left idle for an extended period. The system first prompts the user to continue working or log out, and then offers a countdown period prior to automatically closing and returning focus to the Sign In page.*

---

The **Admin Tools** navigation menu is permission-based, and can provide access to one or more of the following sections, if the related products are in use for the organization or enabled for the Administrator:



- ❖ **Dashboard** – The home page for Administrators that provides access to key information, features, and the areas each Admin is authorized to manage within the portal
- ❖ **Locations & Groups** – Location and Group level setting management
- ❖ **Services & Users** – User Account list and access to manage individual user service settings.
- ❖ **Contact Directory** - A page for managing optional custom contact listings for display in the Common Directory on hosted phones.
- ❖ **Trunking** – Review and manage SIP Trunk settings (or customized IP Trunking and/or Enterprise Trunking, where enabled/in use).
- ❖ **Enterprise Settings** – Manager enterprise-level services and settings.
- ❖ **Contact Directory (Enterprise)** – Manage additional contacts for the enterprise contact directory.
- ❖ **Documents** – Review any documentation included by the service provider (where in use).
- ❖ **\*Contact Center** – Administer contact center settings and configurations.
- ❖ **\*Devices** – Restricted Access. Specially trained and authorized Admins may review and manage NEPS devices in inventory on the account. Advanced training required.
- ❖ **\*Service Changes** – Restricted Access. Advanced service change and simple 1 step order management tools only displayed to specially trained and authorized Administrators. Advanced training required.
- ❖ **\*Microsoft Teams** - Restricted Access. MS Teams integrations only. Administration tools for Microsoft 360/Teams Administrators.
- ❖ **\*Call Recording** – Limited Access. Authorization / Advanced level access permissions required. Manage basic voice settings for users with Call Recording licenses and Admin access to open the Call Recording portal.

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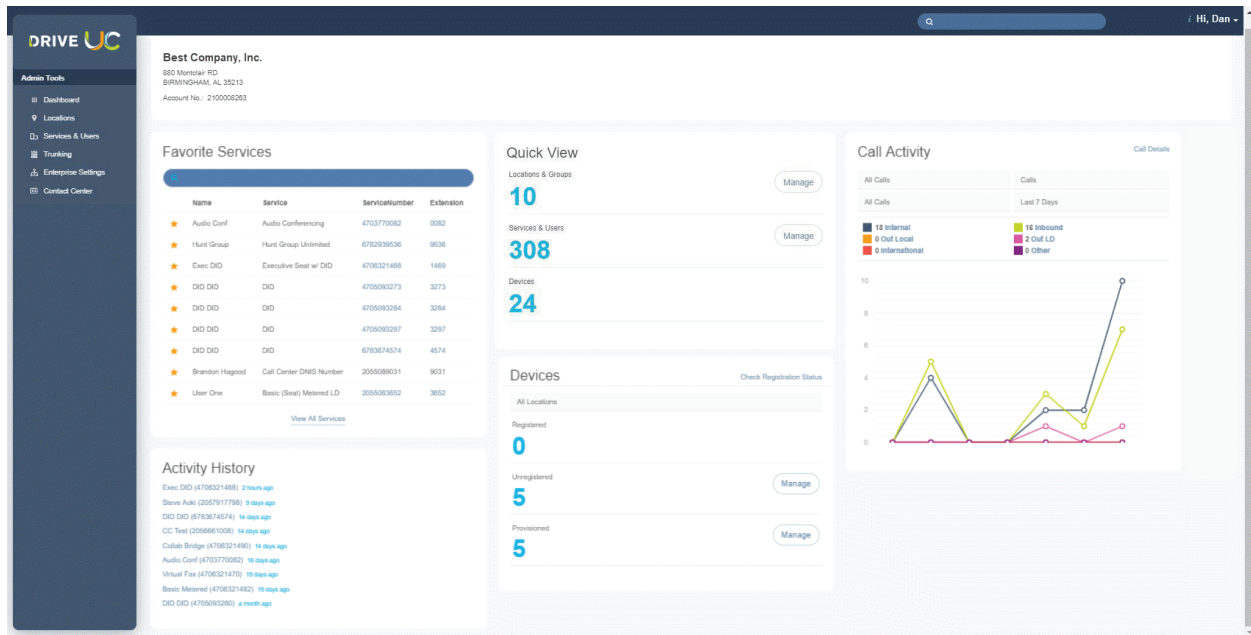
*Your role and authorization level determine the sections and features you may view and manage.*

---

Each menu option in the Admin Tools menu opens the main page to begin working with the related settings or services when those are included on the account. Only the options and services the Admin is authorized to view by the organization or provider will be available for review within the portal.

# Dashboard

The **Dashboard** is the Home page for Admins. It provides at-a-glance filtered information about the activity of the accounts and services the Admin may view, site-wide search functionality, and quick access to all of the work areas the Admin needs within the portal.

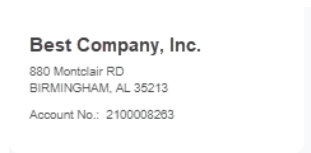


## Admin Dashboard Sections

Each section widget (card) featured within the Admin Dashboard provides useful information, tools, and quick access links to relevant work areas.

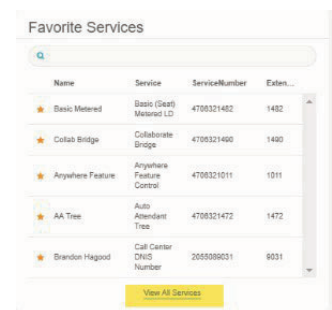
### Profile

This card at the top of the Dashboard offers the basic account information as a reference.



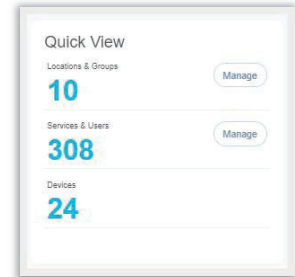
### Favorite Services

A list of the service and user accounts that the Admin includes in their Favorites list (stars ★) with quick links to access those accounts from the dashboard for routine management tasks. The **View All Services** link opens the **Services & Users** page for review.



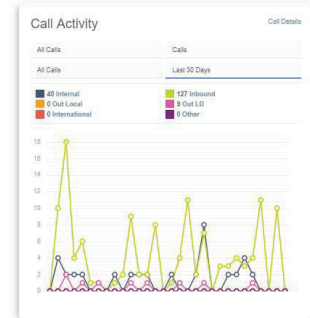
### Quick View

Up-to-date information about the account, including the number of [Locations & Groups](#), [Services and Users](#), and [Devices](#), with links to filtered views of the pages where those items can be managed.



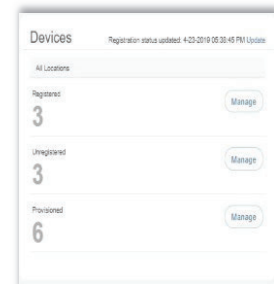
### Call Activity

This section provides a graphical view of call data, with filtering tools to review by location, call type, time-frame, etc. This card offers useful 'mouse-over' details of the statistics and a [Call Details](#) link to review filterable call log data and export call logs to a spreadsheet format for reporting. *Note: To optimize response times in the portal when viewing Call Details logs, if the call log list grows to over 10,000 records returned, the system displays a message that the Export Call Logs tool should be used to view the results.*



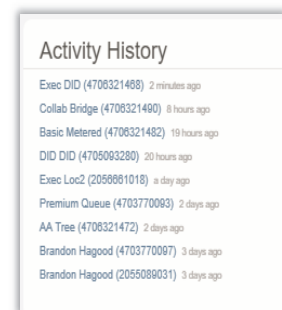
### Devices

The Devices card displays the current counts for NEPS and BroadSoft registered and/or provisioned devices in inventory, with access to filter the information per [Location](#), check registration status information, and access to review and [Manage](#) the *Registered*, *Unregistered* or *Provisioned* Devices assigned to selected [Locations/Groups](#).



### Activity History

This dashboard section shows the times of the most recent Administrator-level activity on the system (that the admin may access) and provides direct access links to the [User Services Dashboard](#) of each account displayed in the list.



### Voicemail Usage Report

*Restricted Access.* If this optional dashboard section displays to Authorized Administrators, it offers a list the most recent voicemail activity within the organization, and access to historical logs. When reviewing the logs, column header sorting and useful filters are available. An [Export VM Usage Report](#) link (top right) allows the admin to download a .csv spreadsheet of the list contents as currently sorted or filtered.

Service ID	Today	Total	New	Saved	Last Access...
4407971854	1	5	5	0	07-14-2021 02:28:42 AM CST
4407971851	1	1	1	0	07-14-2021 02:28:11 AM CST
4407971850	2	2	2	0	07-14-2021 02:28:07 AM CST
4407971849	1	3	3	0	07-14-2021 02:28:08 AM CST
4407971499	2	4	3	1	07-14-2021 02:28:08 AM CST

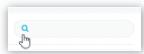
Location/Group	Service ID	Service Name	First Name	Last Name	Time	Time	Time	Time	Time	Time	Time
Exec	4407971854	Exec	Brandon	Hagood	07-14-2021 02:28:42 AM CST	07-14-2021 02:28:42 AM CST	07-14-2021 02:28:42 AM CST	07-14-2021 02:28:42 AM CST	07-14-2021 02:28:42 AM CST	07-14-2021 02:28:42 AM CST	07-14-2021 02:28:42 AM CST
Exec	4407971851	Exec	Brandon	Hagood	07-14-2021 02:28:11 AM CST	07-14-2021 02:28:11 AM CST	07-14-2021 02:28:11 AM CST	07-14-2021 02:28:11 AM CST	07-14-2021 02:28:11 AM CST	07-14-2021 02:28:11 AM CST	07-14-2021 02:28:11 AM CST
Exec	4407971850	Exec	Brandon	Hagood	07-14-2021 02:28:07 AM CST	07-14-2021 02:28:07 AM CST	07-14-2021 02:28:07 AM CST	07-14-2021 02:28:07 AM CST	07-14-2021 02:28:07 AM CST	07-14-2021 02:28:07 AM CST	07-14-2021 02:28:07 AM CST
Exec	4407971849	Exec	Brandon	Hagood	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST
Exec	4407971499	Exec	Brandon	Hagood	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST	07-14-2021 02:28:08 AM CST

## Locations & Groups

The **Locations & Groups** page provides a searchable list of the Locations (Groups) currently configured on the account. Authorized Admins may search for terms within the list, use the column headers to sort the data alphanumerically, edit features the Group uses, and export a detailed location list to a .csv format report.

Name	Location ID	Services	Users	SVC Street	SVC City	SVC State	Emergency Call Notification Email	E911	Edit
DevOps Test 5	3100002152-06	0	0	404 W MARKET ST	LEESVILLE	OH	newtesting@records.com	See 911 Address List	
DevOps Test 6	3100002152-07	0	0	404 W MARKET ST	LEESVILLE	OH	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanDevOpsTest	3100002152-08	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanDevOpsTest	3100002152-09	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanDevOpsTest	3100002152-10	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanDevOpsTest	3100002152-11	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanDevOpsTest	3100002152-12	1	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanTestHouse	3100002152-13	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanTestHouse	3100002152-14	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanTestHouse	3100002152-15	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanTestHouse	3100002152-16	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
SeanTestHouse	3100002152-17	0	0	49 W MINER ST	COALDALE	PA	cody.hawthorne@momentumtelecom.com	See 911 Address List	
NewSeanTest	3100002152-18	3	0	880 MONTCLAIR RD	BIRMINGHAM	AL	cody.hawthorne@momentumtelecom.com	See 911 Address List	

### Section Search



Enter terms to locate data specific to the **Locations & Groups** section.

### Column Links

The link under **Name** opens the Group Settings view. The links in the **Location ID**, **Services**, and **Users** columns open new filtered views within the **Services & Users** page. The **Emergency Call Notification Email** and **See 911 Address List** links open views for management of the e911 call notification email or registered address changes for the relevant Location or Group.

### Edit



The **Edit** icon for each Location opens the **Group Settings** page for Feature maintenance and administration tasks. The link under the **Name** column *also* opens the Settings dialog for group level feature management of a selected Location or Group.

## Emergency Call Notification Email

The **Emergency Call Notification Email** sends an email to the address on file when 911 is dialed from a phone within the system. The Locations & Groups page provides access for Admins to view the current notification email address on file for the Enterprise or a Location. Where authorized, Admins may also change the *Emergency Call Notification Email* address to be used by one or more Locations. This feature is a requirement of the FCC. See: [FCC.gov - Kari's Law/Ray Baum's Act](https://www.fcc.gov/kari-law-ray-baum-act)

**Note:** Permission to edit this information at the location/group level is managed at the *Enterprise* level. See also: [Enterprise Settings - Emergency Call Notification Email](#).

While viewing the Locations & Groups page:

1. Click on the link under the **Emergency Call Notification Email** column next to a Location within the list to open the *Edit Emergency Call Notification Email* dialog and view the current information. *This is a read-only view when the Enterprise level email is in use for all locations and editing at the Location/Group level has been disabled.*

*If authorized to make any changes to the email that is on file at the Location/Group level:*

2. Emergency Notification Email Address: Enter **one (1)** complete email address to which notifications will be sent when 911 calls are made from system phones assigned to this location. A distribution email address may be used.
3. **Optional:** Apply Setting to Other Locations: In this section, *authorized* Admins may elect to use the notification email address entered in this dialog for multiple locations.
4. Click to place a check in the box  next to the Locations that will also use this email address to receive email notifications when 911 calls are made from assigned system phones.
5. Click **Save** when finished to update the system with the new information and return focus to the Locations page view.

The screenshot shows a dialog box titled "Edit Emergency Call Notification Email". At the top, it displays "3100001951-01 - Hosted IP PBX". Below that, the "Emergency Notification Email Address" is set to "authorizedcontact@email.com". A "Test Email" button is located to the right of the email address field. Under the heading "Apply Setting to Other Locations:", there is a list of locations with checkboxes. The first location, "3100001951-02 SIP Trunking", has its checkbox checked. Other locations include "3100001951-03 Hosted IP PBX 2", "3100001951-04 Service Office", "3100001951-05 Brandon Ent SIP Trunk Test", "3100001951-06 IPTrunking test location", "3100001951-07 IP Trunking Test2", and "3100001951-08 location gamma". At the bottom of the dialog are "Save" and "Close" buttons.

**Note:** Synchronization is usually quick, but it can take up to 15 minutes to fully update all necessary areas within the service provider system with the email address information defined here when it is saved.

**Optional:** Test Email: Click on the *Emergency Call Notification Email* link within the Locations list again and click on the **Test Email** button to send a validation email to the address to confirm that an email will be received at the address entered. No further action is needed or required when the email is received. **Note:** The Test Email button may not provide a useful confirmation until after the Email address has been saved and propagated throughout the provider system.

**Optional:** Repeat the single email steps (1, 2 and 4 above ) as needed for the Locations/Groups that should have an *alternate* Emergency Call Notification Email address defined.


## See 911 Address List

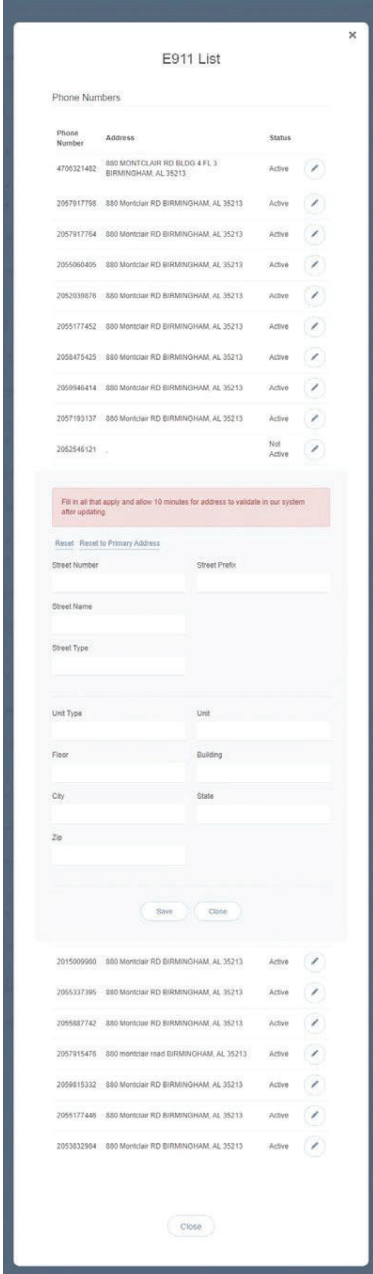
The e911 column offers access to review the current e911 address information for numbers assigned to a Location or Group via the [See 911 address List](#) link. Each number listed displays either **Active** and the current address information on file for review or **Not Active** with the address fields awaiting correct information to be entered. It is important to ensure that each line has an address entered. The e911 address information entered/displayed here is used by emergency services to locate the origination of a call to the Public Safety Answering Point (PSAP) system. Every organization should ensure that a detailed and complete description of the location (full street address along with building, floor, etc.) is provided for each device / telephone number in use in their system at all locations.

**Note:** Any e911 address entered/modified by an Admin or User from this portal and successfully updated in the Public Safety Answering Point (PSAP) system is used by Emergency Services and should include details that will help first responders to quickly find the location of the person who placed a 911 call from a system device that is registered to your organization and the Service Provider. e911 address information may be edited/managed at the Location level or User level.

Ref: [FCC.gov - Kari's Law/Ray Baum's Act](https://www.fcc.gov/kari-law-ray-baum-act)

*While viewing the Locations & Groups Page:*

- Click on the [See 911 Address List](#) link adjacent to a Location listing.
- Click on the Edit  icon adjacent to a desired listing to make changes.
- Perform one or more of the following actions:
  - Reset:** Click this link to clear the fields and enter correct information below.
  - Reset to Primary Address:** Click this link to apply the Location's Primary Address information as this user's e911 address.
    - Enter the correct information in each field (as needed) to update or add new e911 address information for the user assigned to the TN. Note: Complete the specialty fields for unit type, floor, building, etc. to enhance the details of the e911 address on file and ensure that there is a Dispatchable Location delivered to the PSAP with a 911 call from that line that consists of the validated street address of the calling party, plus additional information such as suite, apartment, building, floor, or similar information necessary to adequately identify the location of the calling party for first responders and speed up response time during emergencies.
- Click **Save** to update the system with the new information or click **Close** to collapse the view without making changes. *Once saved, the PSAP system will validate the new address information and update. This validation process takes approximately 10 minutes to complete for an address. A **success** message displays when that process completes, and the address is registered to the phone number.*
- Click **Close** when finished or click outside the dialog to exit the e911 List and return focus to the Locations & Groups list.



The screenshot shows the 'E911 List' interface. At the top, there's a title 'E911 List' and a close button. Below it is a table with columns for 'Phone Number', 'Address', and 'Status'. The table lists several phone numbers with their corresponding addresses and status (Active or Not Active). Each row has an edit icon (pencil) next to it. Below the table is a modal form for editing address details. The form has a red warning box that says 'Fill in all that apply and allow 10 minutes for address to validate in our system after updating.' The form fields include: 'Reset - Reset to Primary Address', 'Street Number', 'Street Prefix', 'Street Name', 'Street Type', 'Unit Type', 'Unit', 'Floor', 'Building', 'City', 'State', and 'Zip'. There are 'Save' and 'Close' buttons at the bottom of the form. Below the form, the table continues with more phone numbers and addresses.


Phone Number	Address	Status
4706321402	880 MONTCLAIR RD BLDG 4 FL 3 BIRMINGHAM, AL 35213	Active
2057917706	880 Montclair RD BIRMINGHAM, AL 35213	Active
2057917704	880 Montclair RD BIRMINGHAM, AL 35213	Active
2055660405	880 Montclair RD BIRMINGHAM, AL 35213	Active
2052038676	880 Montclair RD BIRMINGHAM, AL 35213	Active
2055177452	880 Montclair RD BIRMINGHAM, AL 35213	Active
2058475425	880 Montclair RD BIRMINGHAM, AL 35213	Active
2059946414	880 Montclair RD BIRMINGHAM, AL 35213	Active
2057193137	880 Montclair RD BIRMINGHAM, AL 35213	Active
2052546121		Not Active



*Some e911 address management tasks require intervention by the Service Provider to complete. An Authorized Contact for your organization should communicate with their assigned Service Provider contact (AM/PM or the Customer Support team) to request assistance with those changes that are not self-managed and, where applicable, to discuss any potential additional PSAP registration costs per Location that may be incurred by such changes. The Service Provider is standing by to assist.*

## Access Group Settings by Location

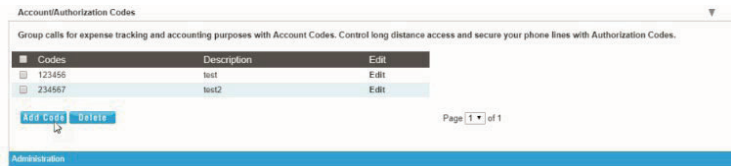
The **Locations & Groups** page provides easy access to manage the group or location's feature settings.

1. Click on the **Edit** icon  adjacent to a Location (far right column) to open the Location's Group Settings dialog. Any features or services the Group uses are displayed for management in this page.
2. Once in the **Group Settings** page, click on the **▶** arrow under the View/Edit column adjacent to a setting in the list to open its **Edit** view.

**Locations & Groups** features often include at least some of the following setting options:

## Account / Authorization Codes

- Account Codes organize calls for expense tracking and accounting purposes.
- Authorization Codes control long distance access and secure your phone lines.



### Add an Account or Authorization Code

1. Click the **Add Code** button.
2. Enter a Code and a Description (name).
3. Click the **Save** button to submit the new code and return the focus to the Account/Authorization Codes **Edit** view.
4. Click to place a check in the box  next to the code to enable usage.
5. Click the **Save** button to update the system and close the **Edit** view.

### Account / Authorization Code Administration

In the Administration section of the Account/Authorization Codes **Edit** view:

1. **Type:** Click within the radial button to turn **ON**  Account **OR**  Authorization Codes.
2. **Number of Digits:** Define the required code length using the drop-down menu.
3. **Allow Local and Toll-Free Calls without Account/Authorization Code:** Optional - Place a check in the box  to enable this functionality.
4. **Set Restricted User Types:** Click to select desired SIP Trunk Users within the **Non-Restricted** list and use the arrows **◀ ▶** to move them to (or from) the **Mandatory** or **Optional** fields.
5. Click the **Save** button below when finished to update the system and return to Group Settings.

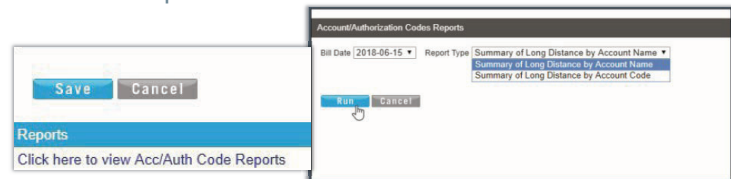


### Edit an Account / Authorization Code

- A. Click within the checkbox  next to a code to enable or disable the code and click **Save** within the Code list section to update the system.
- B. Click on the **Edit** link next to a Code in the list to change the name or code numbers and click the **Save** buttons in each area to submit the changes.

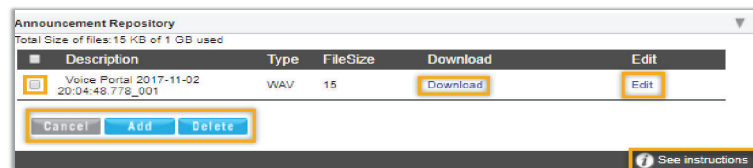
## View Account / Authorization Code Reports

1. Click on the [Click here to view Acc/Auth Code Reports](#) link.
2. Select the Bill Date.
3. Select the Report Type.
4. Click the **Run** button to create and review the selected report.



## Announcement Repository

Manage the announcements and greetings that are available for selection by the group. This feature offers the ability to upload and store announcements and messages. Files uploaded and stored in the group Announcement Repository are available within selection lists when setting up Voicemail greetings and announcement messages. Basic Instructions and file size requirements are provided via the [See Instructions](#) link in the Edit view. While in the Settings page, click the adjacent ► arrow under View/Edit to open the Edit view.



The repository offers up to 1 GB of storage space. The total amount of storage that has been used displays for review. Maximum file size for audio announcements is 5 MB in CCIT u-Law 8kHz, 8-bit Mono format.

### Add an Announcement File

1. Click on the **Add** button to begin.
2. Type the Name to be displayed in file selection lists.
3. Click on the **Choose File** button to select a local audio file to upload into the repository.
4. Click the **Save** button.

### Download an Announcement File

1. Click on the [Download](#) link.
2. Select the local folder you wish to use to store a copy of the file.

### Edit an Announcement File

1. Click on the [Edit](#) link next to an Announcement to view its settings. Change the Name or,
2. Click the **Choose File** button to navigate to and select a new file to upload/replace the announcement.
3. Click on the **Save** button to submit changes and exit.

### Delete an Announcement File

**Caution:** This action is immediate and cannot be undone.

1. Click to place a check  in the box next to an Announcement.
2. Click on the **Delete** button. The removal action is immediate.

## Auto Attendant

Manage the basic settings for the automated receptionist line(s) that answer the phone with a personalized message providing up to twelve (12) options for connecting to various people, departments, etc., and will be assigned its own extension or directory number. Basic instructions are provided via the See Instructions link in the settings dialog.

While in the Settings view, click the adjacent arrow under View/Edit to open the Edit view.

Phone Number	Extension	Edit
4703770068	0068	Edit

Page 1 of 1

[See instructions](#)

### Edit Auto Attendant Basic Settings

- Click on the **Edit** link next to the Auto Attendant listing to review the current settings.
- Make the following changes, *as needed*:
  - Active:** Click within the checkbox to set to  **Active** or to  disable the Auto Attendant.
  - Name:** Type a name that displays in lists.
  - Calling Line ID First Name / Last Name:** Type the name that will show on Caller ID for this Auto Attendant
  - Time Zone:** Select the appropriate time zone where the Auto Attendant (or Location/Group) resides.
  - Business Hours:** Select the Appropriate option from the drop-down menu.
  - Holiday Schedule:** Select the Appropriate option from the drop-down menu.
  - Scope of extension dialing:** Select  Enterprise or  Group.
  - Scope of name dialing:** Select  Enterprise or  Group.
- Click **Save** to submit the changes and return the Auto Attendant list.

### Edit Auto Attendant Business Hours Prompts

- Click on the **Edit** link next to the desired Auto Attendant listing to review the current settings.
- Click on the **Set Business Hours Prompts** button.
- Select  Standard Greeting or  Custom Greeting, upload and choose a greeting from the drop-down menu.
- Enable first-level extension dialing: Click within the checkbox to  enable, as needed.
- Add Auto Attendant Prompt Descriptions and Actions for each line (up to 12), as needed.
- Click the **Save** button to submit the changes and return to the Edit Auto Attendant dialog.
- Click the **Save** button to update the system with the new Auto Attendant settings and return to the Auto Attendant list.

Description:	Action:	Telephone Number
0 test	Transfer To Operator	@0070
1	Extension Dialing	
2	Name Dialing	
3	Exit	
4		
5		
6		
7		
8		
9		
*		
#		

## Edit Auto Attendant After Hours Prompts

1. Click on the [Edit](#) link next to the desired Auto Attendant listing to review the current settings.
2. Click on the [Set After Hours Prompts](#) button.
3. Select  Standard Greeting or  Custom Greeting upload and choose a greeting from the drop-down menu.
4. Enable first-level extension dialing: Click within the checkbox to  enable.
5. Add Auto Attendant Prompt Descriptions and Actions for each defined line (up to 12), as needed.
6. Click the [Save](#) button to submit the changes and close the pop-up dialog.
7. Click the [Save](#) button to update the system with the new Auto Attendant settings and return to the Auto Attendant list.

## Auto Attendant – Tree

Manage the advanced settings for Auto Attendant lines and create one or more submenus to handle additional lines, multiple calling schedules, individual departments, etc.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

## Edit Auto Attendant Tree Advanced Settings

1. Click on the [Edit](#) link next to the Auto Attendant listing to review the current settings.
2. Make the following changes, as needed:
  - **Active:** Click within the checkbox to set to  *Active* or  *Disabled*.
  - **Name:** Type a name that displays in lists.
  - **Calling Line ID First Name / Last Name:** Type the name that will show on Caller ID for this Auto Attendant.
  - **Department:** Choose an option from the drop-down menu.
  - **Language:** Choose an option from the drop-down menu.
  - **Time Zone:** Select the appropriate time zone where the Auto Attendant (or Location/Group) resides.
  - **Network Class of Service:** Choose an option using the drop-down menu.
  - **Enable video support:** Click within the checkbox to  enable or disable .
  - **Scope of extension dialing:** Select  Enterprise or  Group.
  - **Scope of name dialing:** Select  Enterprise or  Group.
  - **Name Dialing Entries:** Select the display type option for names.
  - **Transfer to the operator after seconds of inactivity:** Enter an amount of time (seconds).
3. Click [Save](#) to submit the changes and return the Auto Attendant list.

### Set Auto Attendant Tree Business Hours Prompts

1. Click on the [Edit](#) link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the Set Business Hours Prompts button.
3. Select  Default Greeting or  Personal Greeting upload and choose a greeting from the drop-down menu.
4. Click within the checkbox to  Enable first-level extension dialing.
5. Add Auto Attendant Prompt Descriptions and Actions for each line (up to 12), as needed.
6. Click the [Save](#) button to submit the changes and return to the *Edit Auto Attendant* dialog.
7. Click the [Save](#) button to update the system with the new Auto Attendant settings and return to the Auto Attendant list.

### Set Auto Attendant Tree After Hours Prompts

1. Click on the [Edit](#) link next to the Auto Attendant listing to review the current settings.
2. Click on the [Set After Hours Prompts](#) button.
3. Select  Default Greeting or  Personal Greeting upload and choose a greeting from the drop-down menu.
4. Click within the checkbox to  Enable first-level extension dialing.
5. Business hours: Choose an option from the drop-down menu.
6. Add Auto Attendant Prompt Descriptions and Actions for each line (up to 12), as needed.
7. Click the [Save](#) button to submit the changes and return to the Edit Auto Attendant dialog.
8. Click the [Save](#) button to update the system with the new Auto Attendant settings and return to the Auto Attendant list.

### Set Auto Attendant Tree Holiday Prompts

1. Click on the [Edit](#) link next to the Auto Attendant listing to review the current settings.
2. Click on the Set Holiday Prompts button.
3. Select  Default Greeting or  Personal Greeting upload and choose a greeting from the pre-defined list in the drop-down menu.  
(These greetings were uploaded previously in [Announcement Repository](#)).
4. Click within the checkbox to  Enable first-level extension dialing, as needed.
5. Holiday Schedule: Choose an option from the drop-down menu.
6. Add up to 12 Auto Attendant Prompt Descriptions and Actions, as needed.
7. Click the [Save](#) button to submit the changes and return to the Auto Attendant *Edit* view.
8. Click the [Save](#) button to update the system with the new Auto Attendant settings.

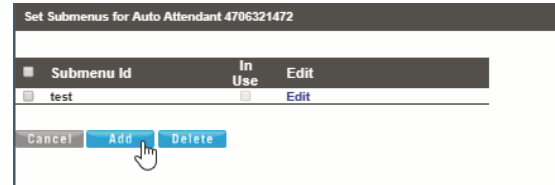
## Add Auto Attendant Tree Submenus

The advanced settings in **Auto Attendant – Tree** offer the ability to create one (1) overall Auto Attendant PLUS multiple Auto Attendants under it that can be set up to handle calls or specific work for locations, groups, or departments, and more.

1. Click on the **Edit** link next to the Auto Attendant - Tree listing to review the current settings.

2. Click on the **Submenus** button to open the *Set Submenus for...* dialog.

3. Click on the **Add** button to begin creating a new Auto Attendant *Submenu*.



4. Define the following, as needed:

- Submenu ID: Type a name that displays in lists.
- Select  Default Greeting or  Personal Greeting upload and choose a greeting from the drop-down menu.
- Click within the checkbox to  Enable extension dialing at any time.
- Add Auto Attendant Prompt Descriptions and Actions for each line (up to 12), as needed.

5. Click **Save** to submit the changes and return the Auto Attendant list. Repeat to add more Auto Attendant - Tree Submenus.

## Edit Auto Attendant Tree Submenus

1. Click on the **Edit** link next to the Auto Attendant - Tree listing to review the current settings.

2. Click on the **Submenus** button to open the *Set Submenus for...* dialog. Click on the **Edit** link next to the Submenu.

3. Modify the settings or prompts, as needed.

4. Click the **Save** button to submit the Submenu changes and return to the Auto Attendant Tree Setting view.

5. Click the **Save** button in the *Setting* view to update the system with the new setup and close the dialog.

## Delete Auto Attendant Tree Submenus

**Caution:** This action is immediate and cannot be undone.

1. Click on the **Edit** link next to the Auto Attendant - Tree listing to review the current settings.



3. Click within the checkbox  next to the Submenu you wish to delete from the list.

4. Click on the **Delete** button to remove the selection and close the *Set Submenu for...* dialog.



## Outbound Caller ID

Manage the Caller ID that is shown for outbound calls from users/devices assigned to the Trunk Group.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

### Manage Outbound Caller ID

1. Click to select  E911,  DID, or  Custom.
2. Click the **Save** button to submit the information and close the dialog. If e911 is selected, the primary billing number is displayed.

## Series Completion

This service provides key *Hunt Group* functionality by allowing the Admin to assign users' lines. The system will hunt through this set of lines according to the pre-defined order and availability.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

### Add Series Completion

1. Click on the **Add** button to open the setup dialog.
2. Enter a Name to display in lists.
3. Highlight Available Users and use the arrows to move them to the Assigned Users section.
4. Click the **Save** button when finished to submit the data and close the dialog.

### Edit Series Completion

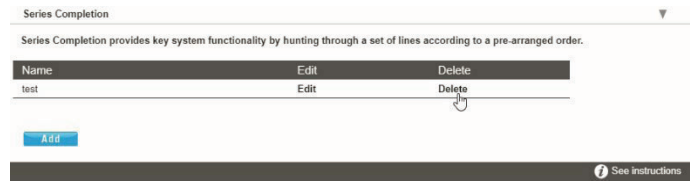
1. Click on the **Edit** link adjacent to the Series you wish to modify.
2. Make changes to the Name or Assigned Users.
3. Click the **Save** button to submit the changes and close the dialog.

### Delete Series Completion

**Caution:** This action is immediate and cannot be undone.

1. Click on the **Delete** option adjacent to the item you wish to remove from the system.

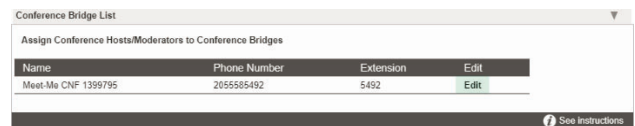
*The selected item is immediately removed from the list and from the system.*



### Conference Bridge List

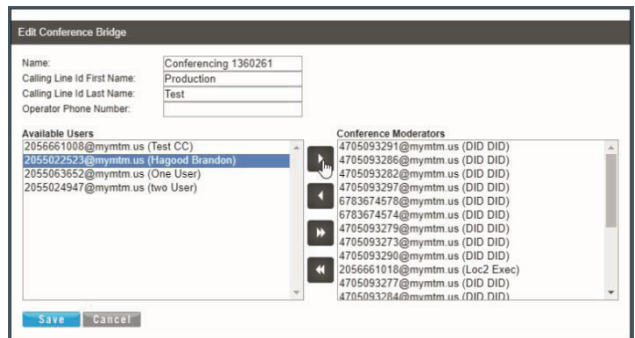
Assign Conference Hosts and Moderators for your Conference Bridge(s).

While in the Settings page, click the adjacent ► arrow under View/Edit to open the **Edit** view.



### Manage Conference Bridge List

1. Click on the **Edit** option adjacent to the Conference Bridge you wish to modify.
2. Make changes to the Name, Calling Line names, Operator Phone Number or Conference Moderators.
3. Click the **Save** button to submit the changes and close the dialog.



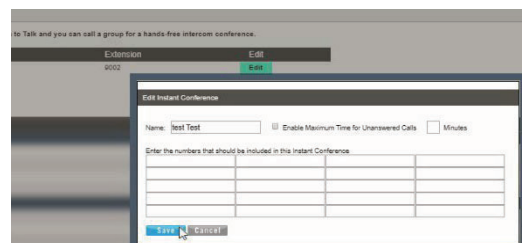
### Instant Conference

Manage this feature for use with the Push To Talk service to create hands-free intercom conferencing for Groups. Once defined, users may dial the **Instant Conference to Call Group** number or use the intercom by dialing \*50 followed by the instant conference extension.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the Edit view.

### Manage Instant Conference

1. Click **Add** or **Edit** Instant Conference to manage the Instant Conference group.
2. Enter or modify the Name for the Instant Conference.
3. Maximum Time for Unanswered Calls: Click within the checkbox to  Enable /  Disable and specify a time in Minutes.
4. Enter the appropriate 10-digit phone number(s) to be added to Instant Conference (define the group).
5. Click the **Save** button to submit the data and close the dialog.



## Call Park (Groups)

Manage the Locations & Groups settings for Call Park Groups and enable people within your organization to park and retrieve 1 call at a time.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

### Manage Call Park Group Default Settings

- Select or Enter the following:
  - Settings for Call Park:**
    - Alternate User Recall To: ☉ Choose a user type.
    - Set Display Timer (length in seconds).
    - Click to  Disable /  Enable Parked Destination Announcement.
    - Ring Pattern for Recalled Calls: Select an option from the drop-down menu.
    - Recall Timer: Set an amount of time (from 30-600 seconds).
    - Alert Alternate Recall User Wait Time: Set an amount of time (from 30-600 seconds).
- Click the **Save** button to submit the default settings and close the dialog.

### Add a Call Park Group

- Click the **Add** button.
- Accept the default or enter a Group Name.
- Choose the group's Recall To: ☉ user type.
- Use the ◀ ▶ arrows to move highlighted Assigned Users to/from Selected Users.
- Click the **Save** button to submit the information and close the dialog.

### Edit a Call Park Group

- Modify the Call Park (Group) Default Settings.
- Click the **Save** button to update the call park group default settings.
- Optional: Click the **Edit** option next to a Group in the list.
- Modify the Group Name, Recall To, or User assignments.
- Click the **Save** button to submit the changes and close the dialog.

## Delete a Call Park Group

**Caution:** This action is immediate and cannot be undone.

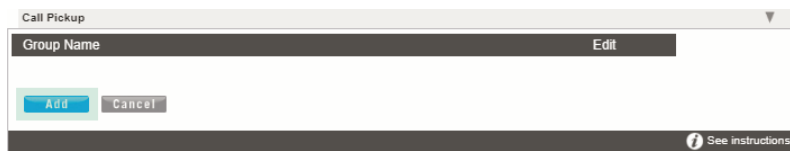
1. Click the **Edit** button next to a Group in the list.
2. Click the **Delete** button to remove the Group listing and close the dialog. The selected Call Park Group is immediately removed.



## Call Pickup (Groups)

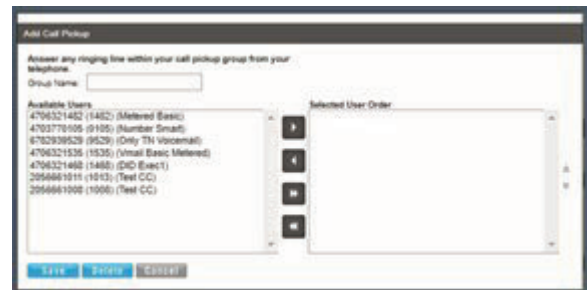
Assign and Allow users to answer any ringing line within their call pickup group.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the **Edit** view.



## Add a Call Pickup Group

1. Click the **Add** button.
2. Enter a Group Name.
3. Click the arrows to move highlighted Available Users to/from Selected User Order.
4. Click the **Save** button to submit the new group and close the dialog.



## Manage Call Pickup Groups

1. Click on the **Edit** option next to a Call Pickup Group.
  - a. Make Changes to **Name** and/or **Selected Users** and click the **Save** button.

Or

  - b. **Use Caution:** Click the **Delete** button to instantly remove the group from the system and close the dialog.

## Advanced Hunting

Utilize all your lines and prevent unnecessary busy signals. When a call is generated to a line that is busy the call automatically rolls to the next number defined within the Hunt Group.

### Manage Advanced Hunting Settings

- Click on the **Edit** option next to the Hunt Group listing.
- Make changes to the following settings and options:
  - Name:** Enter a name that displays in lists.
  - Calling Line ID (First/Last):** Enter the Caller ID name.
  - Hunt Style:** Select a hunt style from the drop-down options.
  - Allow Call Waiting:** Click to  Enable /  Disable.
  - Highlight and use arrows to move Available Users to/from Selected User Order and/or Directory Number Hunting.**

**Note:** When a user is assigned to Directory Number Hunting and the user receives a call, the call is presented to the user first. If this Directory Number user is busy or unavailable, the service then applies the Hunt Style policy that has been configured for the Hunt Group. If a number is included in the Directory Number Hunting field, it essentially becomes a pilot number for the Hunt Group if busy or not answered.

- Department:** Select the appropriate department from the drop-down selection list.
  - Time Zone:** Select the appropriate time zone for the group/location.
  - Allow Members to control Group Busy:** Click to  Enable /  Disable.
  - Enable Group Busy:** Click to  Enable /  Disable.
  - Apply Group Busy When Terminating Call To Agent:** Click to  Enable /  Disable.
  - Skip to next agent after x rings:** Click to  Disable /  Enable and select the amount of rings.
  - Forward call after waiting x seconds:** Click to  Disable /  Enable and specify the time (seconds).
  - Enable Call Forwarding Not Reachable:** Click to  Enable /  Disable.
  - Calls forward to:** Enter the 10-digit phone number/SIP URI.
  - Make Hunt Group busy when all available agents are not reachable:** Click to  Enable /  Disable.
  - Use system default CLID:** Click to  Enable /  Disable.
  - Customize the CLID for this Hunt Group:** Click to  Enable /  Disable.
  - Include the Hunt Group Name in the CLID:** Click to  Enable /  Disable.
- Click the **Save** button to submit the new data and close the dialog.

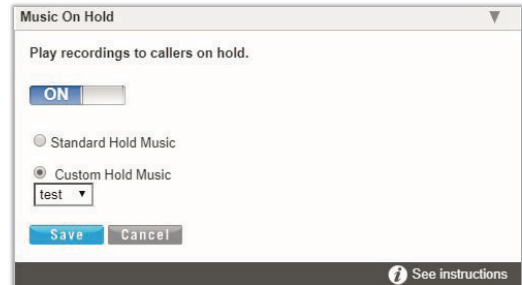
## Music On Hold

Manage the music or greeting files played to callers when placed on hold. Basic Instructions and file size requirements are provided via the  [See instructions](#) link.


While in the Settings page: Click the adjacent  arrow under View/Edit to open the [Edit](#) view.

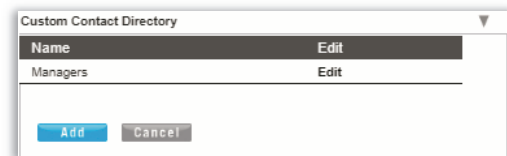
### Manage Music On Hold

1. Click to turn **ON** or Off
2. Select  Standard Hold Music or  Custom Hold Music.
3. *Optional:* Choose a pre-uploaded 'custom file' from the drop-down menu (see: [Announcement Repository](#)).
4. Click the **Save** button to submit the change and close the dialog.





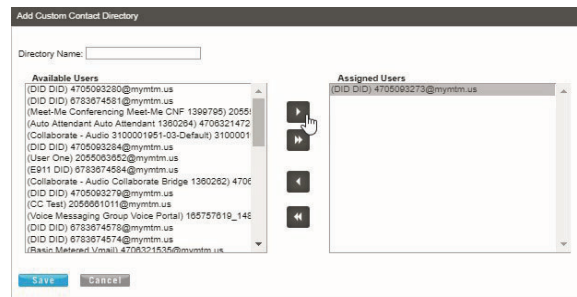
## Custom Contact Directory

Create and manage customized contact groups within the directory. While in the Settings page, click the adjacent  arrow under View/Edit to open the [Edit](#) view.



### Add a Custom Contact Directory List

1. Click on the **Add** button to create a custom contact list.
2. Type a Name for the list.
3. Select from the Available Users list and use the arrows   to move them to/from the Assigned Users section
4. Click the **Save** button when finished to submit the list and close the pop-up dialog.



### Edit a Custom Contact Directory List

1. Click the **Edit** option next to a Contact List.
2. Make changes to the list Name or Assigned Users, as needed.
3. Click the **Save** button to update the list and close the pop-up dialog.

### Delete a Custom Contact Directory List

1. Click the **Edit** option next to a Contact List.
2. Click the **Delete** button to immediately remove the list from the system and close the dialog.

## Departments

Manage the Departments created for selection or assignment in the Location/Group.

The screenshot shows a web interface titled "Group Services" with a sub-header "Custom Contact Directory". Below this is a "Departments" section containing a table with one row: "Department Name" and "Edit". To the right of the table is a "View/Edit" link. Below the table are two buttons: "Add" and "Cancel". A mouse cursor is pointing at the "Edit" link.

### Add a Department

1. Click the [Add](#) button to create a new Department. Type the Department Name.
2. Select the Parent Department from the drop-down menu options.
3. Click the [Save](#) button to submit the changes and close the dialog.

The screenshot shows the "Add Department" dialog box. It has a title bar "Department Name" with an "Edit" link. Below the title bar are "Add" and "Cancel" buttons. The main area contains the following fields: "Department Name:" (text input), "Parent Department:" (dropdown menu with "None" selected), "Department Calling Line ID Name:" (text input), and "Department Calling Line ID Number:" (dropdown menu with "None" selected). At the bottom are "Save" and "Cancel" buttons.

### Edit a Department

1. Click on the [Edit](#) link next to the Department.
2. Make the changes you wish to make.
3. Click the [Save](#) button to submit the changes and close the dialog.

The screenshot shows the "Edit Department" dialog box. It has a title bar "Edit Department". Below the title bar are "Save", "Delete", and "Cancel" buttons. The main area contains the following fields: "Department Name:" (text input with "Maintenance" entered), "Parent Department:" (dropdown menu with "None" selected), and "New Department Name:" (text input). At the bottom are "Save", "Delete", and "Cancel" buttons.

### Delete a Department

**Caution:** This action is immediate and cannot be undone.

1. Click on the [Edit](#) link next to the desired Department.
2. Click the [Delete](#) button to remove the selected department from the system and close the dialog.

## Enterprise Directory

The Enterprise Directory feature offers an online listing of all phone service information within the Enterprise directory for the account. While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

### View/Print Enterprise Directory

- Click on the [Enterprise Directory Summary](#) link to view, save, and/or print a summarized phone directory list
- Or
- Click on the [Enterprise Directory Details](#) link to view, save, and/or print a more detailed phone directory list

Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID
3100001951-02-Default (Collaborate - Audio)						3100001951-02
3100001951-03-Default (Collaborate - Audio)						3100001951-03
3100001951-04-Default (Collaborate - Audio)						3100001951-04
3100001951-05-Default (Collaborate - Audio)						3100001951-05
Auto Attendant 1390284 (Auto Attendant)	4708321472	1472				3100001951-01
Auto Attendant 1390371 (Auto Attendant)	4703770096	0096				3100001951-01
BroadWorks Anywhere 1390257 (BroadWorks Anywhere)	4708321011	1011				3100001951-01
Collaborate Bridge 1390282 (Collaborate - Audio)	4708321490	1490				3100001951-01
Conferencing 1390281 (Meet-Me Conferencing)	4703770082	0082				3100001951-01
DID.DID	4708093280	3280				3100001951-02
DID.DID	4708093291	3291				3100001951-02
DID.DID	4708093284	3284				3100001951-02

## Time Schedule

The Location **Time Schedule** feature allows Admins to set the group or location's schedules for business hours, holidays, and events. Calls that fall within these times can be sent to voicemail or receive a pre-defined greeting.

### Add a Schedule

- Click to place a checkmark  next to the preferred option (Business Hours or Holiday Schedule).
- Click the [Add](#) button under that option.
- Enter a unique Schedule Name.
- Click the [Save](#) button when finished.

**Time Schedule** ON

**Business Hours Schedule** [Edit](#)

Enterprise Test [Edit](#)

[Cancel](#) [Add](#) [Delete](#)

**Holiday Schedules** [Edit](#)

Thanksgiving [Edit](#)

Christmas [Edit](#)

[Cancel](#) [Add](#) [Delete](#)

[See instructions](#)

### Delete a Schedule

**Caution:** This action is immediate and cannot be undone.

- Click within the checkbox  adjacent to a Schedule to select it.
- Click on the [Delete](#) button within that section to immediately remove the Schedule and any events attached to it.

### Add an Event

- Click to place a checkmark next to the preferred option ( Business Hours or  Holiday Schedule).
- Click [Add Event](#) to define the following options for a specific event type:
  - Event Name:** Required - Type a short title for review in lists.
  - Start Date:** Select the date the event begins.
  - Click to select/enable the All Day Event checkbox  , or define the following: Start Time, End Time, and/or End Date.

- Optional: Recurs – (Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week)
- Optional: Start / End Announcement: Custom feature for Holiday Events only. Works with the Auto Attendant Tree Set Holiday Prompts feature. *Note: Does not work with the Recurs... settings or events spanning multiple days. Note: Set an End Announcement only if there is no start announcement or prompt defined to begin the next event.*
- Optional: Recur every x (Months or Year and/or the Numerical day of the month).
- Optional: End – Never, After (x # of occurrences), or Date (set the end date).

3. Click **Save** when finished to submit the data and close the dialog.

### Edit an Event

1. Click on the **Edit** option next to the desired Time Schedule option.
2. Make changes to the event name, date, times, or recurrences.
3. Click **Save** when finished to submit the changes and close the dialog.

### Delete an Event

**Caution:** This action is immediate and cannot be undone.

1. Click within the checkbox  adjacent to a Schedule to select it.
2. Click the **Edit** option next to the selected item to review the schedule's list of Events.
3. Click within the checkbox  adjacent to an Event listed within the dialog to select it.
4. Click on the **Delete Event** button.
5. Click on the **Save** button to update the data for the Schedule and close the dialog.

## Manage Lines

Manage the names and numbers associated with lines on the account. Search tools are included on the page to assist admins in their tasks.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the **Edit** view.

1. Click the **Edit** link next to a number to update the information.
2. Make changes to the Name (first/last), Line Description, and Outbound Caller ID, as needed.
3. Click on the **Save** button to submit the changes and close the dialog.

Manage Lines

Last Name	First Name	Phone Number	Extension	Line Description	Edit
Metered	Basic	+1-4706321482	1482	Basic Metered	Edit
Number	Smart	+1-4703770105	0105	Smart Number	Edit
Only TN	Voicemail	+1-6782939529	9529	Voicemail Only TN	Edit
Vmail	Basic Metered	+1-4706321535	1535	Basic Metered Vmail	Edit
DID	Exec1	+1-4706321468	1468	Exec DID	Edit
Test	CC	+1-2059861011	1011	CC Test	Edit
Test	CC	+1-2059861008	1008	CC Test	Edit

Cancel

See Instructions

Edit Line

First Name:

Last Name:

Line Description:

Outbound Caller ID:

Save Cancel

## Manage Users

Manage users, their basic portal access rights as well as their extension assignments.

While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

### Manage User Password and Recovery Email

1. Locate the user you wish to modify within the list. Click the [Edit](#) option next to the selected user.
2. Enter the following, as needed:
  - Password: Type the new Password and again in Re-enter Password to confirm.
  - Password Recovery Email: Type the full email in [name@email.com](#) format. This is where the system will send the recovery information.
3. Click the [Save](#) button to submit the change and close the dialog.

### Add Users to Groups

1. Click the [Add User](#) button. Enter or define the following:
  - User Name: Type the name or designation (phone number, device type, etc.) you wish to display in lists.
  - Password: Enter and reenter the password assignment for the user.
  - Password Recovery Email: Enter an email address for password recovery notifications.
  - Group Admin: Click to enable/disable this as the initial assignment.
  - Contact Center Manager: Click to enable/disable this as the initial assignment.
  - Highlight item(s) in the Available Groups section and use the arrows to add to the *Assigned Groups*.
2. Click the [Save](#) button to submit the change and close the dialog.

### Edit User Access and Extension

1. Locate the user you wish to modify within the list.
2. Click the [Edit](#) option next to the selected user.
3. Make changes to the following, as needed:
  - Password (and repeat)
  - Password Recovery Email: Enter a new email address.
  - Assign Administrative Rights to Enable, as needed.
  - Assign Contact Center Manager Rights to Enable as needed.
  - Extension Assignments: Select from the Available Numbers and use the arrows ◀▶ to move to or from the User Extensions.
4. Click the [Save](#) button to submit and close the dialog.

## Set Advanced Administration Permissions

Additional permissions for managing Service Changes and Devices may be defined by an Administrator with access to modify those settings. Each assignment provides access to manage the specified areas and features when the user logs in as Admin.

See also: [Devices](#) and [Service Changes](#).

1. Locate a user with the Admin set to Yes within the list.
2. Click on the [Edit](#) option next to the selected user.
3. Click on the [Advanced Administration Permissions](#) link to review and edit additional access permission settings for the Devices or Service Changes sections in the Cloud Services Portal.
4. Click within the check boxes to  enable or  disable appropriate device inventory or service change request management tool permissions, as needed. Please note, it is always suggested that the permissions that are enabled here be limited to only those tasks the Admin requires access to perform. It is not recommended for typical Admins to be granted access to work with all of these features or tools, and caution should be used when granting access to these advanced features where misuse can negatively impact account services and billing.
5. Click the [Save](#) button to submit the changes, close the dialog, and return to the [Edit User](#) view.

## Set Call Recording Section Access for Users

Once a user has been added to an account, an authorized Admin in the Portal may Edit and assign the correct level of access for Call Recording Section if the Call Recording service is in use. Please note: Most call recording license holders do **not** need access to Admin tools in the Cloud Services portal OR login access to the Call Recording portal.

If a user has an Advanced Call Recording license assigned (for Supervisors and Admins) and *should be* granted access to work in the Call Recording portal and/or to the Admin Tools Call Recording Section in this portal, the settings to enable access those areas are defined here.

*Note: Use caution and ensure that only the minimum level of access to either portal needed is granted to ensure all privacy compliance requirements are met.*

1. While in Manage Users, click the [Edit](#) option next to the selected user to begin.
2. Select  one (1) of the following options, as needed:
  - Admin + Call Recording Supervisor - Only assign to a licensed Call Recording user who is authorized to be an Admin in the Cloud Services portal and as a Supervisor in Call Recording.
  - Admin + Call Recording Admin - Only assign to a user who is allowed to have Administrator level access in both portals.
  - Call Recording Supervisor (Only) - Assign if licensed user is authorized to be a Supervisor in Call Recording only and is NOT an admin in the Cloud Services portal.
  - Call Recording Admin (Only) Assign if this user is authorized to have Administrator level access to work in the Call Recording portal but will not work within the Cloud Services Portal. (This option was designed for limited use to track cases and usage when a customer requests a license for an auditor to review their call recordings, but that auditor does not have a seat and does not need access to any services or features in the Cloud Services portal.)
3. Click the [Save](#) button to submit and close the dialog. **See also:** [Call Recording](#).

## Delete Users

**Caution:** This action is immediate and cannot be undone. Any assignments, associations, or add-ons must be managed in other areas of the portal prior to removal, as well.

1. Click within the checkbox  adjacent to a user to select that individual.
2. Click the [Delete User](#) button to instantly remove the user from the list and from the system.

## Manage Group Calling Line ID

**Important:** If your system uses extension-only seats (without associated telephone numbers) along with *Call Recording* assigned, changing the Group Calling Line ID here will cause the Call Recording feature to stop working.

Please have an authorized contact request the appropriate Call Recording configuration changes by the Operator/Service Provider before changing the Group Calling Line ID.

1. Define or select from the following options, as needed:
  - Use Group name for Calling Line Identity: Click within the checkbox  to Enable and define the following options as needed:
    - Calling Line ID Group Name: Enter the group name that displays in Caller ID
    - Calling Line ID Group Number: Select the number option from the list.
    - Use User phone number for Calling Line identity:  Click to enable, as needed.
    - Use configurable phone number for Calling Line identity:  Click to enable, as needed.
    - Use group/department phone number for Calling Line Identity:  Click to enable, as needed.
2. Click the [Save](#) button to submit the changes and close the dialog.

**Manage Group Calling Line ID**

Use group name for Calling Line Identity

Calling Line Id Group Name

Calling Line Id Group Number

Use user phone number for Calling Line Identity

Use configurable phone number for Calling Line Identity

Use group/department phone number for Calling Line Identity

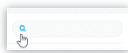
WARNING: If you have extension-only seats, without associated telephone numbers and with Call Recording assigned, changing the Group Calling Line ID will cause Call Recording to stop. Please have your administrator contact the service provider and make the appropriate Call Recording configuration changes before changing the Group Calling Line ID.

## Services & Users

The **Services & Users** section lists the individual accounts within the enterprise (or area the admin reviews). The data is searchable and sortable and includes all important information at-a-glance. Admins may also set users or services as Favorites ★ in this page, Check / Update the RegistrationStatus, or go directly to a specific account dashboard to review and manage settings.

Service Type	First Name	Last Name	Service ID	Extension	MAC	Location	Dept	Assigned To
Anywhere Feature Control	anywhere	control	7027289287	9287		Call Center		anywhere control
DID	DID	DID	7027289287	9287		SP Trunking		DID DID
Basic Managed Seat with Voicemail w/ DID	Basic	M Virel	7027289285	9285	ja4824138dc	Call Center		Basic M Virel
Auto Attendant Tree	AA	Tree	7027289283	9283		Call Center		AA Tree
Premium Call Center Agent						Location 3		
Auto Attendant Unlimited	Standard	AA	7027289286	9286		Call Center		Standard AA
Collaborate Bridge	Collab	Bridge	7027289292	9292		Call Center		Collab Bridge
Premium Contact Center Queue with 70 Usermax	Premium	CC	7027289250	9250		Call Center		Premium CC
Auto Conferencing	Audio	Conf	7027289281	9281		Call Center		Audio Conf
DID	DID	DID	7027289288	9288		SP Trunking		DID DID
DID	DID	DID	7027289290	9290		SP Trunking		DID DID
DID	DID	DID	7027289273	9273		SP Trunking		DID DID
DID	DID	DID	7027289289	9289		SP Trunking		DID DID
DID	DID	DID	7027289296	9296		SP Trunking		DID DID
DID	DID	DID	7027289285	9285		SP Trunking		DID DID
DID	DID	DID	7027289271	9271		SP Trunking		DID DID

### Section Search



Locate any data found within the table below.

### Check Registration Status

Poll NEPS / Broadsoft provisioned device registration status and update.

### Favorites ★

The first column allows Admins to set items as Favorites ★ for easy Dashboard access.

### Service ID & Ext

The links under the Service ID and Ext columns open the User Services Dashboard for the selected account.

## Manage Services & Users

Locate an item in the list and click on the [link](#) under the Service ID or Ext column to open the individual User Dashboard to review the current information for the account and access all account features for administration:

**Carin Smith** calling Line ID:

MOUMENTUM TELECOM

User ID: @mymth\_us

Enterprise ID: 7021

Group ID: 2021...A1

Service Number: 884P ID:

Network Class of Service:

ES11 Address:

Max Address: 841C

Temporarily Update Contact 911 Service Address:

View Profile

Applications

No applications are available.

**Voicemail** 0

Voicemail:

No recent voicemails

Voicemail Settings | Manage Greetings | Reset Voicemail Pin

**Basic Features**

Anonymous Call Rejection:

Call Forward:

Consented Line ID Restrictions:

Do Not Disturb:

Outbound Caller ID Block:

View All Features

**Call Logs** (6917)

All Calls | 18 Calls | Last 30 Days

Direction	Caller ID	Phone	Date	Time
In	Jesse		2018-05-28	11:52:31 AM
Out			2018-05-27	8:57:37 PM
In	UNSRC		2018-05-27	8:58:42 PM
Out	Michael		2018-05-27	9:58:18 PM
Out	Michael		2018-05-27	9:59:54 PM
In	Michael		2018-05-27	9:59:12 PM
In	Elzabe		2018-05-26	2:58:21 PM
Out	John A.		2018-05-26	10:01:19 AM
Out	John A.		2018-05-25	2:13:18 PM
In	Tsui C.		2018-05-25	8:57:35 AM
Out	Callan		2018-05-25	3:38:47 PM
In	Patrick		2018-05-20	2:49:47 PM
In	Abhin		2018-05-18	1:00:03 PM
Out	John A.		2018-05-18	1:00:12 PM
In	John A.		2018-05-18	1:27:39 PM
Out			2018-05-18	1:00:48 PM
In	WANTE		2018-05-18	1:00:22 PM
Out			2018-05-18	12:00:18 PM
In	Brandt		2018-05-18	10:51:50 AM
In	John A.		2018-05-14	2:23:31 PM

View All Call Logs & Details

## User Profile

This dashboard card displays the current profile information, and the [View Profile](#) button provides access to manage temporary e911 locations, Change the Password, Manage notification emails and update directory information.

## Voicemail

This card displays recent un-deleted voicemails to play, delete, forward, or block callers. A red dot • indicates un-played messages. A [View All Voicemails & Details](#) link provides access to review and manage all undeleted voicemails *if there are more undeleted messages available than can be displayed within the dashboard.*

## Call Logs

This dashboard card displays the latest calls to/from the user's device and [View All Call Logs](#) button opens a new page to display up to 1000 calls within the past 90 days, with filtering tools and a link to [Export Call Logs](#) to a spreadsheet report format.

## Applications

This card provides direct links to the landing or Sign In page for add-on applications assigned to the user, if applicable.

## Basic Features

This card displays the **On/Off** feature settings for easy access and the [View All Features & Services](#) link offers direct access to the user's **Settings** page to manage all services and features provided for the account.

## Working with User Settings

Clicking on the [View All Features](#) link at the bottom of the Basic Features card opens the **Settings** page, which lists the features and services that are available to the user in an easy to read table format and provides access to View and to Edit the settings for each feature.

Settings		
Profile		<a href="#">VIEW/EDIT</a>
Profile		
<b>General</b> <span>ON/OFF</span> <a href="#">VIEW/EDIT</a>		
Anonymous Call Rejection	OFF	<a href="#">▶</a>
Announcement Repository		<a href="#">▶</a>
Call Block	OFF	<a href="#">▶</a>
Caller ID	ON	<a href="#">▶</a>
Call Notify	OFF	<a href="#">▶</a>
Call Waiting	OFF	<a href="#">▶</a>
Connected Line Identification Restriction	OFF	<a href="#">▶</a>
Do Not Disturb	ON	<a href="#">▶</a>
Holdring Queue	ON	<a href="#">▶</a>
Holdring Host	ON	<a href="#">▶</a>
Outbound Caller ID Block	ON	<a href="#">▶</a>
Priority Alert		<a href="#">▶</a>
Privacy		<a href="#">▶</a>
Selective Call Acceptance	ON	<a href="#">▶</a>
Speed Dial		<a href="#">▶</a>
<b>Forwarding</b> <span>ON/OFF</span> <a href="#">VIEW/EDIT</a>		
Call Forwarding Selective	OFF	<a href="#">▶</a>
Fast Me - Simultaneous Ring	ON	<a href="#">▶</a>
Fast Me - Sequential Ring	OFF	<a href="#">▶</a>
Push to Talk		<a href="#">▶</a>
<b>Messaging</b> <span>ON/OFF</span> <a href="#">VIEW/EDIT</a>		
Voicemail	ON	<a href="#">▶</a>
Distribution List		<a href="#">▶</a>
Instant Message Pin		<a href="#">▶</a>
<b>Mobility</b> <a href="#">VIEW/EDIT</a>		
Airphone		<a href="#">▶</a>
<b>User Services</b> <span>ON/OFF</span> <a href="#">VIEW/EDIT</a>		
Enterprise Directory		<a href="#">▶</a>
Time Schedule	ON	<a href="#">▶</a>

- ❖ Features are generally grouped by type to make similar features easy to locate.
- ❖ On/Off features show their current status within the table.
- ❖ The arrow ► under the [View/Edit](#) column (far right) for a feature opens the [Edit](#) view.
- ❖ Many of the [On/Off](#) features shown in this list and the individually enabled settings shown here may also be managed through the user's device using phone codes, AKA: Star Codes. (ex: \*77).



*Your account type and/or role defines the users, features, and services you may access. Some features shown in this document may not be available to all organizations, Admins, or users.*

### Access the Settings Page

1. In the Dashboard: Click on the [View All Features](#) link in the Basic Features card to open the [Settings](#) page.

### View / Edit User Feature Settings

1. In the [Settings](#) page: Click on the arrow ► under the [View/Edit](#) column next to a feature to open its [Edit](#) view and modify the feature setup.

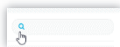
Detailed instructions for managing user access and / or the setup of individual features and services in a non-administrator end user's voice services account are provided in the Cloud Services Portal User Guide.

# Trunking

The **Trunking** page offers a searchable view of the current SIP Trunk Group(s) on the account and offers access to review and manage individual services or users assigned to a SIP Trunk Group. The data displayed here includes **Location ID**, **Trunk Group ID**, **Pilot DID**, **Call Paths**, and the trunk group **Service Number** count.

Location	Location ID	Trunk Group ID	Pilot DID	Enterprise CP	Location CP	Services Numbers	Edit
location 2	<a href="#">3100000028-02</a>	2057219609TRUNK	<a href="#">2057219609</a>	7	2	1	
Sip Trunk Location	<a href="#">3100000028-05</a>	2057219623TRUNK	<a href="#">2057219623</a>	7	3	1	
Hilare's House of Chicken Soup	<a href="#">3100000028-03</a>	2057300916TRUNK	<a href="#">2057300916</a>	7	1	0	
Sip Trunk Location	<a href="#">3100000028-09</a>	2057300979TRUNK	<a href="#">2057300979</a>	7	1	0	

### Section Search



Locate data found within the table below.

### Column Links

The link in the **Location ID** column provides access to review the list of **Services & Users** assigned to the Trunk group. The **Pilot DID** link opens the User Services Dashboard and Profile for the account.



The **Edit** button opens the SIP Trunk Group settings for review and maintenance.



Click on the **Edit** icon adjacent to the Trunk Group listing (far right column) to open the *Trunk Group Features* page and manage the call forwarding settings and usage.

## Manage Trunking Settings

General Settings for SIP Trunking might include any features defined for organization-wide use.

6783674584	
Trunk Group Features	ON/OFF VIEW/EDIT
Call Forward Always	
Unreachable Destination	

For Example:

### Call Forward Always

This feature defines the overall behavior of Forwarding and Routing for the SIP Trunk. Click on the arrow under the View/Edit column to open the *Edit* view for this service.

The default action for *Call Forwarding Always* is **None**.

- Click to enable one of the following alternate options, as needed:
  - Forward to Phone Number/SIP-URI: and enter the 10- digit number (no spaces or special characters).
  - Reroute to Trunk Group and select the group using the drop-down menu.

- Click the **Save** button when finished to submit the data and close the settings dialog.

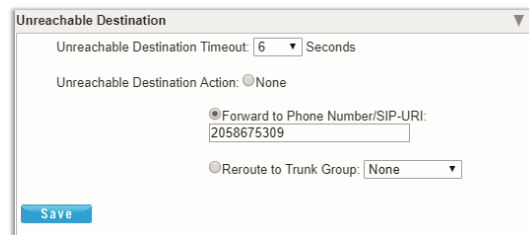
## Unreachable Destination

Manage the behavior for calls when the dialed destination is unreachable. The default action is **None**. Click on the arrow ► under the View/Edit column next to a feature to open its *Edit* view.

1. Click to enable one of the following alternate options, as needed:

- **Forward to Phone Number/SIP-URI:** and enter the 10- digit number (no spaces or special characters).
- **Reroute to Trunk Group** and select the group using the drop-down menu.

2. Click the **Save** button when finished to submit the data and close the settings dialog.



The screenshot shows a dialog box titled "Unreachable Destination". It contains the following fields and controls:

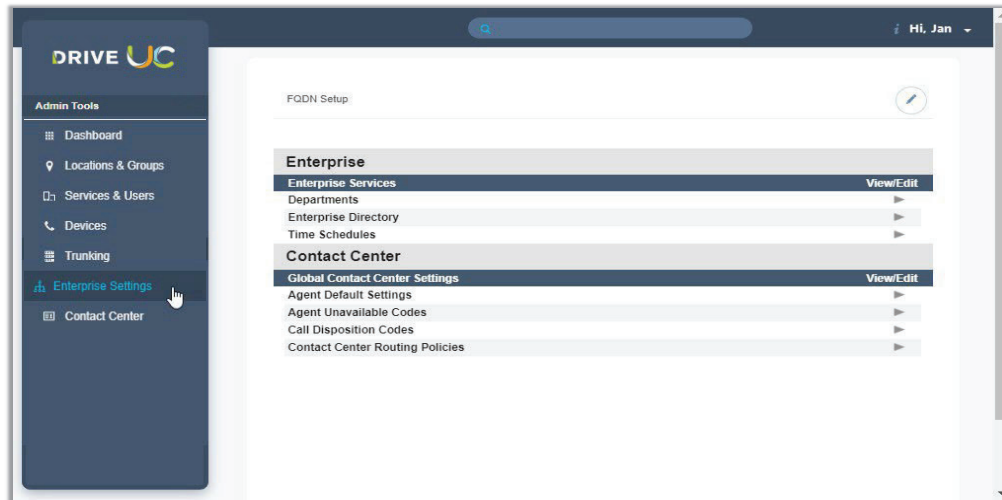
- Unreachable Destination Timeout:** A dropdown menu set to "6" with the unit "Seconds".
- Unreachable Destination Action:** Radio buttons for "None", "Forward to Phone Number/SIP-URI:", and "Reroute to Trunk Group:". The "Forward to Phone Number/SIP-URI:" option is selected.
- Forward to Phone Number/SIP-URI:** A text input field containing the number "2058675309".
- Reroute to Trunk Group:** A dropdown menu set to "None".
- Save:** A blue button at the bottom left.

**Note:** Trunking settings are made available for administration here per the organization's requirements. If additional features or services are displayed for Trunking administration, please refer to the sections in this guide that describe working with those features.

## Enterprise Settings

The **Enterprise Settings** menu option opens that section for review and administration of the global feature settings.

In this section simply click on an ► arrow under the View/Edit column adjacent to the desired Enterprise Service or the Contact Center feature to view the item's *Edit* dialog and manage the settings.



## Enterprise FQDN Setup

Manage the Fully Qualified Domain Names (FQDNs) to be used by devices in inventory on the account.

### Add a Fully Qualified Domain Name (FQDN)

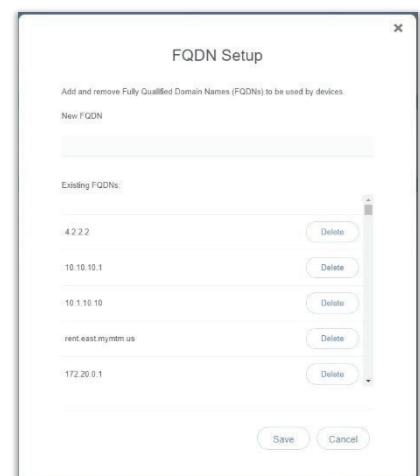
1. Click the **Edit** icon adjacent to the FQDN Setup.
2. Enter a new Fully Qualified Domain Name in the text field.
3. Click **Save** when finished to update the list of available FQDNs and close the dialog.

### Delete a Fully Qualified Domain Name (FQDN)

**Use caution.** This action is immediate and cannot be undone. Any devices setup to use the deleted FQDN must be edited to select an existing FQDN or functionality may be impaired.

In the *Enterprise Settings* view:

1. Click the **Edit** icon adjacent to FQDN Setup.
2. Click the **Delete** button adjacent to an existing FQDN listing.
3. Click **Save** when finished to submit and close the dialog.



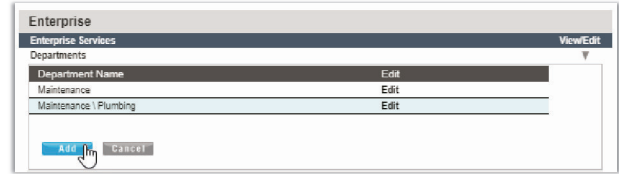
## Enterprise Departments

Administrator-level access to manage departments for the entire organization.

### Add a Department

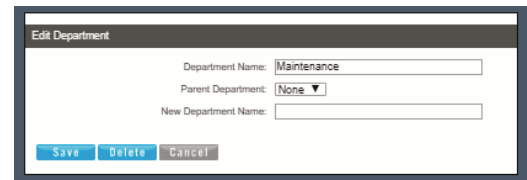
In the [Departments](#) edit view:

1. Click the [Add](#) button to create a new Department.
2. Type the Department Name.
3. Select the Parent Department from the drop-down menu options.
4. Click the [Save](#) button to submit the changes and close the dialog.



### Edit a Department

1. Click on the [Edit](#) link next to a department.
2. Make the changes you wish to make.
3. Click the [Save](#) button to submit the changes and close the dialog.



### Delete a Department

**Caution:** This action is immediate and cannot be undone

1. Click on the [Edit](#) link next to a department.
2. Click the [Delete](#) button to remove the selected department and return to Enterprise Settings.

## Enterprise Directory

The [Enterprise Directory](#) feature offers an online listing of all phone service information within the Enterprise directory for the account.

### Print Enterprise Directory Summary or Details

- Click on the [Enterprise Directory Summary](#) Link to view a summary listing of the Phone List to print using your browser feature.
- OR
- Click on the [Enterprise Directory Details](#) link to view a more detailed report containing all current information in the Phone List.

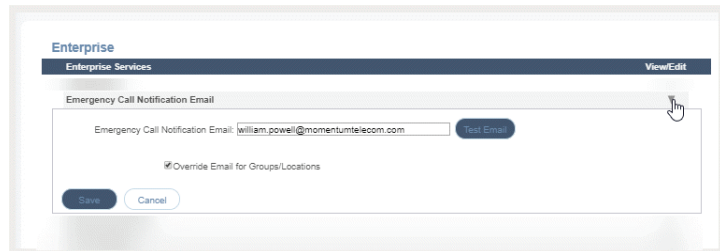
Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID
3100001951-02-Default (Collaborate - Audio)						3100001951-02
3100001951-03-Default (Collaborate - Audio)						3100001951-03
3100001951-04-Default (Collaborate - Audio)						3100001951-04
3100001951-05-Default (Collaborate - Audio)						3100001951-05
Auto Attendant 1305264 (Auto Attendant)	4705321472	1472				3100001951-01
Auto Attendant 1306271 (Auto Attendant)	4703770068	0068				3100001951-01
BroadWorks Anywhere 1305257 (BroadWorks Anywhere)	4705321011	1011				3100001951-01
Collaborate Bridge 1305282 (Collaborate - Audio)	4705321490	1490				3100001951-01
Conferencing 1305251 (Meet-Me Conferencing)	4703770082	0082				3100001951-01
DID.DID	4705093280	3280				3100001951-02
DID.DID	4705093291	3291				3100001951-02
DID.DID	4705093284	3284				3100001951-02

## Enterprise Emergency Call Notification Email

Manage the main (default) email address for notifications when a 911 call is made from a number/device within the Enterprise account. Administrators may review the current email address used for 911 call notifications if one has been defined for the Enterprise, add, or modify the address, send a test email to the address, and allow this default address to be overridden at the Location level by authorized Location/Group Admins. See: [Locations - Emergency Call Notification Email](#)

In the *Enterprise Settings* view:

1. Click on the **View/Edit** drop-down arrow adjacent to **Emergency Call Notification Email** to review, add, or edit the default Enterprise email address that will receive notifications of 911 emergency calls from system users:



2. Emergency Call Notification Email: Enter one (1) email address that will receive emergency call notification messages when a user dials 911 from within the Enterprise system. This address is the default email address on file for receipt of these messages for the Enterprise.
  - **Optional:** Override Email for Groups/Locations: Click to place a check in the box  to allow Location/Group Administrators to override the Enterprise level email address and define alternate email addresses that will receive the notifications when calls to 911 are made from system phones assigned to the location. You may also click to remove the check mark  and disable the override option in Locations. This also reverts all locations to use the Enterprise default email for 911 Call Notifications. **Note:** This check box disables the use of the Enterprise level email address. If all emails should go to the email entered here at the Enterprise level, do *not* click to enable this functionality.
3. Click the **Save** button when finished to submit the changes, update the system (and auto-populate the Locations email addresses), and close the Edit view. Synchronization is generally quick, but it can take up to 15 minutes to fully update all necessary areas within the system to display the email address defined here.
  - **Optional:** Test Email: Return to the **Emergency Call Notification Email Edit** view and click on the Test Email button to send a test email from the system to the address listed in the Emergency Call Notification Email field. A validation email is sent by the system to the address on file. No further action is needed or required when the email is received.

**Note:** A test email may only be sent **after** the address has been saved.

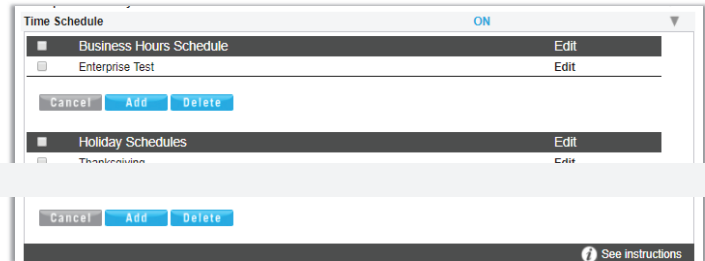
**Tip:** As a simple way to ensure that appropriate parties are notified via a single default email address, consider entering a distribution email address here at the Enterprise Level that includes all the management and supervisory staff in the organization who should be informed and leave the override option unchecked.

## Enterprise Time Schedules

The **Enterprise Time Schedule** feature allows Admins to set the global schedules for during or after business hours, holidays, and events, and manage them online.

### Add a Schedule

1. Click to place a checkmark next to the preferred option ( Business Hours or  Holiday Schedule).
2. Click the **Add** button under that option.
3. Enter a unique SCHEDULE NAME.
4. Click the **Save** button when finished.



### Delete a Schedule

**Caution:** This action is immediate and cannot be undone.

1. Click within the checkbox  adjacent to a Schedule to select it.
2. Click on the **Delete** button within that section to immediately delete the Schedule and any events attached to it.

### Add an Event

1. Click to place a checkmark  next to the preferred option (Business Hours or Holiday Schedule)
2. Click **Add Event** to review and define the following options, as needed for a specific event type:
  - Event Name: Type a short title for review in lists.
  - Start Date: Select the date the event begins.
  - All Day Event: Select the check box  , OR define the Start Time, End Time, and/or End Date
  - Start / End Announcement: Custom option for Holiday Events only. *Note: Works with Auto Attendant Tree - Set Holiday Prompts feature. Does not work with Recurs or multi-day events. Set End Announcement only if there is no Start Announcement or prompt set to begin a next event.*
  - Recurs - (Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week).
  - Recur Every x (Months or Year and/or the Numerical day of the month).
  - End - Never, After (x # of occurrences), or Date (set the end date).
3. Click on the **Save** button when finished to submit the data and close the pop-up dialog.

### Edit an Event

1. Click on the **Edit** option next to the desired Time Schedule option.
2. Make changes to the Event Name, Date(s), Time(s) or recurrences.
3. Click **Save** when finished.

### Delete an Event

**Caution:** This action is immediate and cannot be undone.

1. Click within the checkbox  adjacent to a Schedule to select it.
2. Click the **Edit** option to view the Time Schedule Edit dialog and the list of **Events**.
3. Click within the checkbox  adjacent to an **EVENT** to select it.
4. Click on the **Delete Event** button.
5. Click on the **Save** button to update the Schedule and close the dialog.

## Enterprise Agent Default Settings

Define and manage the default level Contact Center settings for agents to handle Guard Time settings and Agent Unavailable behaviors.

### Manage Enterprise Agent Default Settings

- Select and define the following settings for Agents assigned to the Contact Center:
  - USE GUARD TIME SETTINGS: Click within the radial button to enable either  Default or  Enterprise.
  - Click within the box  to ENABLE GUARD TIME and select the amount of time in *Seconds* using the drop-down menu.
  - USE AGENT UNAVAILABLE SETTINGS: Click within the radial button to enable either  Default or  Enterprise.
  - Click within the box  to enable FORCE AGENT TO UNAVAILABLE ON DO NOT DISTURB ACTIVATION.
  - Click within the box  to FORCE AGENT TO UNAVAILABLE ON PERSONALCALLS.
  - Click within the box  to FORCE AGENT TO UNAVAILABLE AFTER X consecutive bounces and specify the number of bounces using the drop-down menu.
- Click the [Save](#) button when settings are defined to submit the changes and close the dialog.

**Agent Default Settings**

Use Guard Time Settings:  Default  Enterprise

Enable guard time for  Seconds

Use Agent Unavailable Settings:  Default  Enterprise

Force Agent to unavailable on do not disturb activation.

Force Agent to unavailable on personal calls.

Force Agent to unavailable after  consecutive bounces

[Save](#)

## Enterprise Agent Unavailable Codes

Enable, add, and manage activation and usage of the codes that agents will use when unavailable for Contact Center calls. Click on the arrow ► under the View/Edit column next to this feature to opens [Edit](#) view.

### Enable Agent Unavailable Codes

- Select and define the following settings, as needed:
  - Enable Agent Unavailable Codes - Click within the box  to Enable /  Disable.
  - Default Code on Do Not Disturb - Choose the correct option using the drop-down menu.
  - Default Codes Personal Calls - Choose the correct option using the drop-down menu.
  - Choose the Default Codes on Consecutive Bounces using the drop-down menu (Default = None).
  - Optional: Force use of Agent Codes Unavailable with default code - Click within the box  to enable and select a code using the drop-down menu.
- Click the [Save](#) button to submit the data and close the dialog.

**Agent Unavailable Codes**

Enable Agent Unavailable Codes

Default Code on Do Not Disturb activation:

Default Codes personal calls:

Default Codes on consecutive bounces:

Force use of Agent Codes Unavailable with default code:

Active	Code	Description	Edit
<input type="checkbox"/>	55	test	<a href="#">Edit</a>
<input type="checkbox"/>	71	1971	<a href="#">Edit</a>
<input type="checkbox"/>	777	Assisting Others	<a href="#">Edit</a>

[Save](#) [Add](#)

### Add Agent Unavailable Codes

1. Click on the **Add** button to begin adding a new code.
2. Click within the ACTIVE checkbox  to enable the new code for usage.
3. Type the new CODE in the field provided.
4. Type a DESCRIPTION / title that will be displayed for review in lists.
5. Click the **Save** button and close the dialog.
6. *Optional:* Review the list of codes and click within the boxes adjacent to each to Activate  or Deactivate  individual items.
7. Click the **Save** button to submit the changes and close the Agent Unavailable Codes edit settings dialog.

### Edit Agent Unavailable Codes

1. Make changes to the following, as needed:
  - Click to Enable/Disable AGENT UNAVAILABLE CODES (all).
  - Choose alternate default code selections.
  - Click to  Activate or  disable individual codes.
  - Click on the **Edit** link next to a Code in the list to change the code or the description, or to Delete it.
2. Click the **Save** button(s) to submit the changes, update the system, and close the dialogs.

## Enterprise Call Disposition Codes

Add and manage the enterprise level Call Disposition codes that are used for your organization's Contact Center(s). Click on the arrow ► under the View/Edit column next to a feature to open its *Edit* view.

### Add Call Disposition Codes

1. Click the **Add** button to create a new Call Disposition Code.
2. Click within the ACTIVE checkbox to Enable  (default) or Disable  the new code.
3. Enter the new CODE in the field provided.
4. Type the DESCRIPTION (name) in the field provided.
5. Click the **Save** button to submit the new data and close the dialog.

### Edit Call Disposition Codes

- In the Call Disposition Codes Edit view, you may make the following changes:
  - Activate/Deactivate Call Disposition Codes: Click within the Active checkbox to Enable  or Disable  the selected code.
  - Edit Call Disposition Code information: Click on the [Edit](#) option next to an item in the list to review and modify the CODE and DESCRIPTION information.
- Click the [Save](#) button(s) to submit all changes and close dialogs.

The screenshot shows a dialog box titled "Call Disposition Code". At the top right is a close button (X). Below the title bar, there is a checked checkbox labeled "Active". Underneath, there are two input fields: "Code" with the placeholder text "code here" and "Description" with the placeholder text "name here". At the bottom left of the dialog is a blue "Save" button with a mouse cursor hovering over it.

### Delete Call Disposition Codes

**Caution:** This action is immediate and cannot be undone.

- Click within the checkbox  in the [Select](#) column next to a listed code, *Example: Agent Unavailable Code*.
- Click on the [Delete](#) button to remove the code from the system.
- Click the [Save](#) button(s) to submit all changes and close dialogs.

## Enterprise Contact Center Routing Policies

Administrator access to define and manage the type of call routing and/or the call priority level(s) to be used for your organization's Contact Center(s).

Click on the arrow ► under the View/Edit column next to a feature to open its [Edit](#) view.

### Manage Enterprise Contact Center Routing Policies

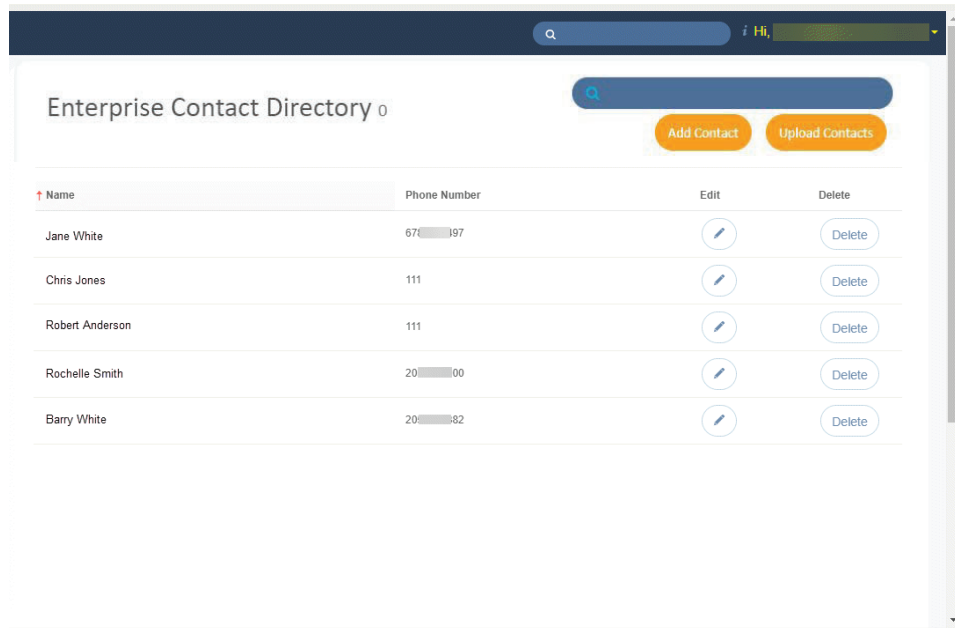
- Select an overall Routing Policy:
- Click the radial button next to  Longest Wait Time (default) or  Priority Order.
- If Priority Order is selected, define the order of priority (1, 2, 3...) for each of the listed Contact Centers.
- Click on the [Save](#) button to submit the changes and exit the dialog.

The screenshot shows a dialog box for managing routing policies. At the top, it says "Routing Policy:  Longest Wait Time  Priority Order". Below this is a table with two columns: "Contact Center Name" and "Priority". The table contains one row with the name "Call Center Renamed2" and the priority value "1". At the bottom left of the dialog is a blue "Save" button.

Contact Center Name	Priority
Call Center Renamed2	1

## Contact Directory (Enterprise)

The **Contact Directory** page provides Admin access to manage the contents of the Enterprise Common Contact Directory on the organization's hosted phones. Authorized Administrators may add, edit, and delete the contacts listed here. Note: Non-Admin Users may access a page containing a read-only version of this list in the portal and may view/use the *Common Contact Directory* on their hosted voice devices.



### Add a Custom Contact

1. Click on the Add Contact button.

2. Enter the Contact Name.
3. Enter the Contact Phone Number.
4. Click the **Save** button when finished to submit the data, close the dialog, and update the list. The Enterprise Common Directory also updates on hosted phones shortly thereafter.


### Edit a Custom Contact

1. Click on the Edit button adjacent to the contact within the list to open the Edit dialog.
2. Change the Contact Name or Phone Number, as needed.
3. Click the **Save** button when finished to submit the new data, close the dialog, and update the list. The Enterprise Common Directory also updates on hosted phones shortly thereafter.

### Delete a Custom Contact

1. Click on the **Delete** button adjacent to the contact you wish to remove from the list.
2. Click on **Yes** when prompted for confirmation.  
The item is immediately removed from the list within the portal and the Enterprise Common Directory also updates on hosted phones shortly thereafter.

## Upload Contacts

1. Click on the Upload Contacts  button to open the directory search dialog.
2. Select the correctly formatted .csv file to upload.  
Contact your service provider to receive a copy of the correctly formatted comma-delimited .csv template)
3. Click the [Submit](#) button when finished to upload the file. add the data, close the dialog, and update the list.  
The Enterprise Common Directory also updates on hosted phones shortly thereafter.

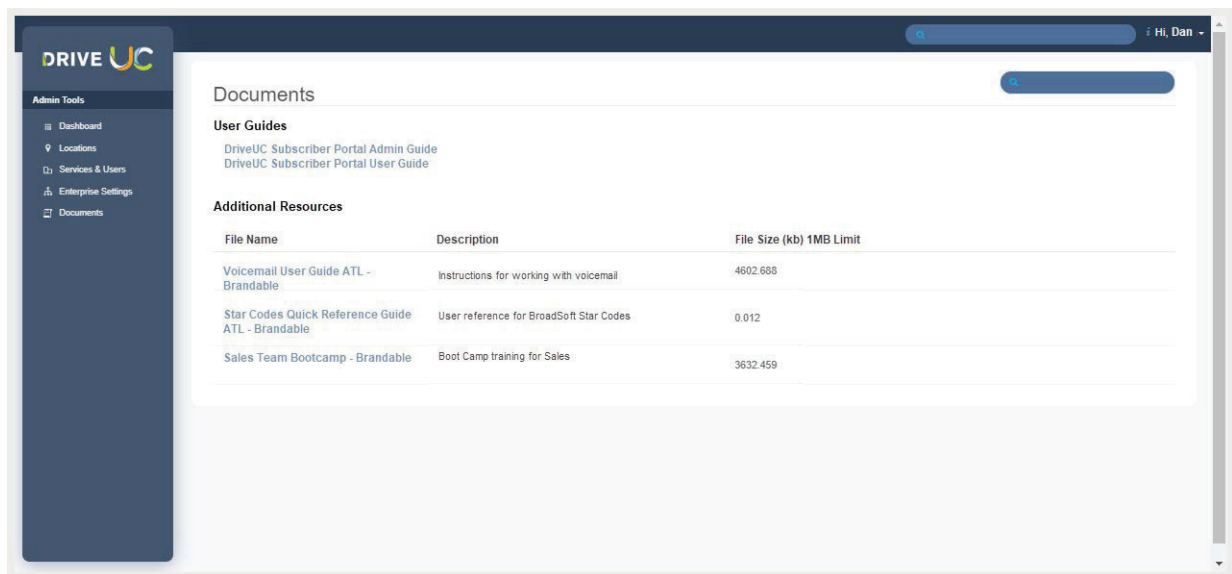
Admins may use the **Edit Custom Contacts** steps (above) to include more information individually as needed for each new addition to the Contact Directory that is entered in this manner.

## Documents

The [Documents](#) page provides a place the Service Provider may use to offer a searchable list of user guides and other helpful resources.

The [Search](#) field within the page provides a useful functionality to locate terms, specific titles, or portions of description text within the lists.

The column headers in the **Additional Resources** section can be clicked to use an  ascending  descending alphanumeric sort function.



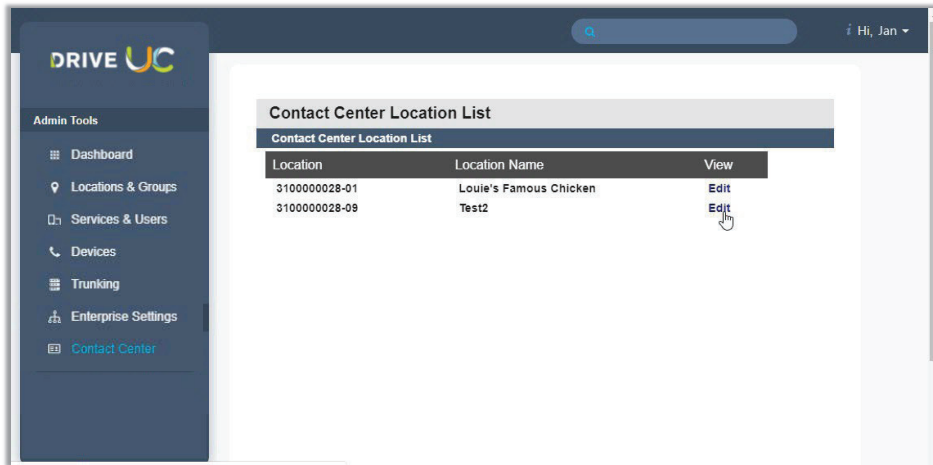
File Name	Description	File Size (kb) 1MB Limit
VoiceMail User Guide ATL - Brandable	Instructions for working with voicemail	4602.688
Star Codes Quick Reference Guide ATL - Brandable	User reference for BroadSoft Star Codes	0.012
Sales Team Bootcamp - Brandable	Boot Camp training for Sales	3632.459

## Download a Document

- Click on a [Document Title](#) within one of the lists to download the selected file to the *Downloads* folder on your PC. The file name displays within a Windows *Download* tab below the Application at the bottom of the browser window for easy access.
- Click on the [Downloaded File](#) tab at the bottom of the browser window to open the file for reviewer edit (where brandable), and/or to **Save** the file to a local folder or computer drive for print or digital distribution.

## \*Contact Center

The **Contact Center** page provides authorized Admins with access to manage call flow and queue configurations and edit Contact Center settings. Simply select a Contact Center in your list and click the adjacent **Edit** link to manage its settings, or click the **Configure** link to define the Basic, Advanced, and Routing Policy features.



## Edit Contact Center Queues

The **Edit** option for a listing in the **Contact Center** page opens the **Contact Center Queue List Edit** view where the fundamental activation, call behavior, Quality of Service, queuing, reporting, and log in requirements are defined.

**Contact Center**  
Edit Contact Center Queue

You can configure Contact Centers to allow agents to log in and out, to queue incoming calls that cannot be answered immediately, to re-direct calls when the group cannot accept calls, and to provide music or video for caller on hold.

Active

Contact Center Type: Premium  
Contact Center ID: 93@mystr.us

Name: CC Loc 1  
Calling Line ID Last Name: From  
Calling Line ID First Name: Queue  
Department: None  
Language: English  
Time Zone: (GMT-05:00) (US) Central Time

Routing Type  
 Priority Based  Skill Based  
 Group Policy  
 Circular  Regular  Simultaneous  Uniform  Weighted Call Distribution

Bandwidth and QoS Settings  
 Preferred announcement / music codec for external calls: G.711  
 Preferred announcement / music codec for internal calls: G.711

Contact Center Settings  
 Queue Length: 50 calls  Enable video support  
 Play ringing when offering call  Allow callers to dial 9 to escape out of queue  
 Reset caller statistics upon entry to queue

Reporting Settings  
 Enable Contact Center External Reporting  
 CCRs: None

Agent Settings  
 Allow agents to join Contact Centers  
 Allow Call Waiting on agents  
 Enable calls to agents in wrap-up state  
 Enable maximum ACD wrap-up timer: 0 : 30 (minutes:seconds)  
 Automatically set agent state to [Wrap-Up] after call  
 Automatically answer calls after waiting 0 seconds

Reset Contact Center Queue Password

Save

### Edit Contact Center Basics

1. Make changes to the following, as needed.
  - Name: Type the name of the Contact Center that will display in lists and reports.
  - Calling Line ID: Type the Last Name and the First Name
  - Department: Choose the appropriate department from the drop-down menu.
  - Language: Select a language from the drop-down menu.
  - Time Zone: Choose the appropriate option for the location of the contact center.
2. Click the [Save](#) button or continue to the next section.

### Edit Contact Center Group Policy Settings

1. Group Policy Section: Define the following, as needed:
  - Circular: hunt agents in order listed on queue profile, starting where the last call left off
  - Regular: Send calls to first available agent on list, always beginning at the top of the list.
  - Simultaneous: Ring all agents at the same time; first user to answer handles the call.
  - Uniform: Send calls to the agent that has been idle the longest.
  - Weighted Call Distribution: (Enables Skills-based routing) Distribute calls to idle agents per their Contact Center profile skill percentage assignments.
2. Click the [Save](#) button, or continue to the next section...

### Edit Contact Center Bandwidth and QoS Settings

1. Select from the following setting options, as needed:
  - Preferred announcement / music codec for external calls: Use the drop-down menu to select from None, G.711, G.726, G.729 or AMR
  - Preferred announcement / music codec for internal calls: Use the drop-down menu to select from None, G.711, G.726, G.729 or AMR
2. Click the [Save](#) button to submit all changes and close the dialog - or continue to the next section.

### Edit Contact Center Settings

1. Select and/or define the following Setting options, as needed:
  - Queue Length calls: Enter the minimum number of calls for the queue to trigger.
  - Enable video support: Click within the checkbox to  enable/  disable
  - Play Ringing when offering call: Click within the checkbox to  enable/  disable.
  - Allow callers to dial to escape out of queue: Enter the digit(s) a caller may dial to exit the queue.
  - Reset caller statistics upon entry to queue: Click within the checkbox to  enable/  disable.
2. Click the [Save](#) button to submit all changes and close the dialog - or continue to the next section.

### Edit Contact Center Reporting

1. Select or define the following Reporting options, as needed:
  - Enable Contact Center External Reporting: Click within the checkbox to  enable/  disable.
  - CCRs: Choose an option from the drop-down menu.
2. Click the [Save](#) button to submit all changes and close the dialog - or continue to the next section.

### Edit Contact Center Agent Settings

1. Select or define the following Agent Setting options, as needed:
  - Allow agents to join Contact Centers: Click within the checkbox to  enable/  disable.
  - Allow Call Waiting on Agents: Click within the checkbox to  enable/  disable.
  - Enable calls to agents in wrap-up state: Click within the checkbox to  enable/  disable.
  - Enable maximum ACD wrap-up timer \_MM\_ : \_SS\_ : Type the ADC wrap-up time limit in Minutes and/or Seconds
2. Automatically set agent state to      after call: Click within the checkbox to  enable/  disable. Click the [Save](#) button to submit all changes and close the dialog.

### Reset Contact Center Queue Password

Manage the password for the Contact Center.

1. Click on the [Reset Contact Center Queue Password](#) link at the bottom of the dialog.
2. Type a new Password.
3. Retype the new Password.
4. Click the [Save](#) button to submit the change to the Call Center queue password.

## Configure Contact Center Features

The [Configure](#) option for a listing in the Contact Center page opens the *Contact Center Queue List* where the Basic, Advanced and Routing Policy feature settings may be managed. Activation for usage of many of these features must also be defined in the [Edit Contact Center Queue](#) section.

1. Click on the [Configure](#) link for a Contact Center listing to open the *Configure Contact Center Queue* dialog. The list of features and services displays.
2. Click on the arrow ► under the View/Edit column next to a feature to open its *Edit* view.

Configure Contact Center Queue	
<b>Basic</b>	<b>VIEW/EDIT</b>
Agents	►
Contact Center Status & Statistics	►
Supervisors	►
Announcements	►
Announcement Repository	►
<b>Advanced</b>	<b>VIEW/EDIT</b>
Distinctive Ring	►
DNIS	►
Queue Status Notification	►
Call Disposition Code	►
<b>Routing Policies</b>	<b>VIEW/EDIT</b>
Forced Forwarding - ACD	►
Holiday Service - ACD	►
Night Service - ACD	►
Bounced Calls - Queue	►
Comfort Message Bypass - Queue	►
Overflow - Queue	►
Stranded Calls - Queue	►

### Contact Center Agents

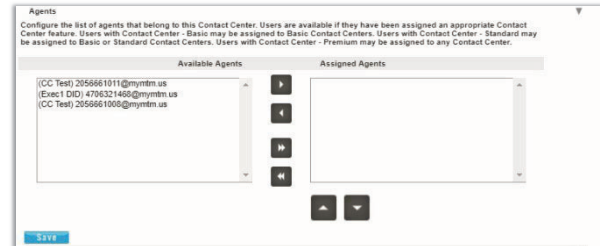
Configure the list of agents that belong to the selected Contact Center. Users are available for selection if they have been assigned an appropriate Contact Center feature.

*Users with Contact Center - Basic may be assigned to Basic Contact Centers.*

*Users with Contact Center - Standard may be assigned to Basic or Standard Contact Centers.*

*Users with ContactCenter - Premium may be assigned to any Contact Center.*

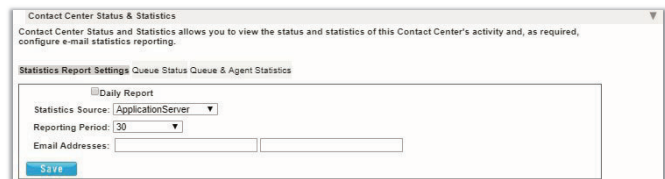
1. Use the ◀▶ arrows to move selected Available Agents to/from the Assigned Agents section.
2. Use the ▲▼ arrows to select and reorder the agents in the Assigned Agents list.
3. Click the **Save** button when finished to submit the data and close the dialog.



### Contact Center Status & Statistics

Configure how the status and statistics of this Contact Center's activity are viewed and setup the email recipient(s).

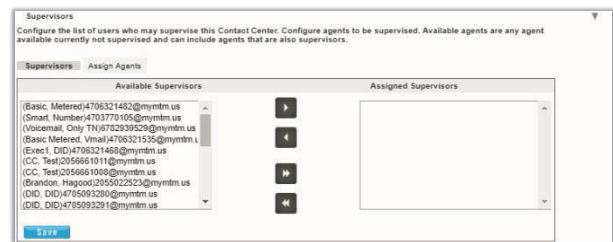
1. Select or enter required information for the following options for statistics and reporting, as needed:
  - Daily Report: Click to enable/disable.
  - Statistics Source: Select the appropriate option from the drop-down menu list, as needed.
  - Reporting Period: Select the appropriate number of days from the drop-down menu list.
  - Email Addresses: Enter email addresses in the fields provided, as needed.
2. Click the **Save** button when finished to submit the data and close the dialog.



### Contact Center Supervisors

Manage the Supervisors and Agent assignments for this contact center.

1. Select *Available Supervisors* and use the arrows to move the selections to the *Assigned Supervisors* section.
2. Click on the Assign Agents tab.
3. Choose a Supervisor from the drop-down menu.
4. Select from the Available Agents and use the arrows ◀ ▶ to move the selections to the Assigned Agents section.
5. Repeat to assign other Supervisors.
6. Click on the **Save** button when finished to update the system and return to the Configure Contact Center Queue dialog.



## Contact Center Announcements

Define the Announcement types and audio file selections for the Contact Center.

1. Select and define the following announcement options, as needed:

- Play Entrance Message
- Entrance Message is mandatory when played
- Audio: Select desired option:
  - Default
  - URL – Enter the URL(s) in order of play
  - Custom – Select File(s) in order of play.

2. Click the **Save** button when finished to submit the data and close the dialog.

## Manage Contact Center Announcement Repository

Manage the announcements and greeting files used by this Contact Center. As with the Announcement Repositories for any Locations, Groups or Departments, the file requirements and current usage amounts for the Contact Center's announcement files are displayed to the Admin, and basic instructions for uploads and management are provided via the SEE INSTRUCTIONS link. See also: [Announcement Repository](#)

## Contact Center Distinctive Ring

Manage distinctive ringing policies for Contact Center calls routed to agents that have Distinctive Ring setup for use.

1. Click to  Enable Distinctive Ringing for Contact Center Calls.
2. Ring Pattern: Select the desired ring tone pattern from the drop-down menu options.
3. Click the **Save** button when finished to update the system and close the dialog.

## Contact Center Bounced Calls – Queue

Configure the Contact Center routing policy for unanswered calls.

1. Enable the following options, as needed:
  - Bounce Calls after x Rings: Enter the number of rings if enabled.
  - Bounce Calls if agent becomes unavailable while routing the call.
  - Alert Agent if call is on hold for longer than x seconds. Enter 30+ seconds if enabled.
  - Bounce Calls after being on hold by agent for longer than x seconds. Click to enable  (as needed) and define an amount of time in seconds.
2. Click the **Save** button when finished to submit the data and close the dialog.

## Contact Center Overflow – Queue

Configure the Contact Center routing policy, including announcements or videos for unanswered calls.

1. Select and define the following action and file options, as needed:

- Perform busy treatment.
- Transfer to phone number SIP URI.
- Play ringing until caller hangs up.
- Enable Overflow after calls wait x Seconds and select the amount of time (seconds) from the drop-down menu.
- Play announcement before overflow processing and define the audio file(s)/types below.
- Audio: Select desired option:
  - Default
  - URL and enter the URL(s) in order of play
  - Custom and select File(s) in order of play.

2. Click **Save** when finished to submit the data and close the dialog.

## Contact Center Stranded Calls – Queue

Configure the Contact Center routing for calls stranded in queue when all agents are signed-out.

1. Select one of the following action options:

- Leave in queue
- Perform busy treatment
- Transfer to phone number SIP or URL: Select to enable and enter the appropriate 10-digit number or URL.

2. Click the **Save** button when finished to submit the data and close the dialog.

## \*Enterprise Trunking

Only organizations that have specialized Enterprise SIP Trunk Groups will access this section and only the Authorized Administrators who manage the organization's SIP Trunks should attempt to work with these management tools.

Trunk Group	Available / Assigned	Priority	Weight	Manage Trunk
2100017914-at01	Assigned	10	10	
2100017914-phi01	Assigned	10	50	
2057300443TRUNK	Assigned	0	0	

### Enterprise Trunking Information

The Enterprise Trunking page offers tools for working with the any Enterprise SIP Trunks on the account. *The Administrators with access to this section must have expertise with PBX/BroadSoft Enterprise SIP Trunk management.*

A simple table view also displays the basic setup for any Trunk Group(s) on the account and tools to change priority and weight settings. The Edit button adjacent to a Trunk Group in this table also offers access to review and/or manage additional available settings and options.

The table display lists the Trunk Group (Name), whether it is currently Available/Assigned, its Priority and the Weight assignments for each trunk group.

Other tools on this page include:

#### Manage Associated DIDs



Click to open a new view and manage DID associations for Trunk Groups.

#### Save / Cancel

When changes are made to the data in the table, these tools display at the top of the page. Click **Save** to submit the changes or click **Cancel** to remove the changes.

#### Column Tools

Click the Column Name to sort data by column contents.

Data within the Available/Assigned, Priority and Weight columns may also be edited using the tools provided.



The Edit button opens the selected Trunk Group's settings dialog for review or maintenance.

## Manage Enterprise Trunking Routing

The top section of the Enterprise Trunking page offers some general call routing settings that are applied to the listed Trunk Groups below.

1. Make changes to the following settings, as needed:
2. Max # of Reroute Attempts (max 10): Use the number selection tool within the field to define the appropriate amount for this setting (0-10).
3. Max # of Reroute Attempts within a Priority (max 10): Use the number selection tool within the field to define the appropriate amount for this setting (0 to 10).
4. Route Exhaustion Action: Select from  **None** (default) **or**  **Forward to Phone** and enter the 10-digit phone number in the field below when it becomes available (do not add special characters or spaces).
5. Click **Save** when finished to submit the change.

## Assign Enterprise Trunk Group

Each Trunk listed in the table offers a tool to assign available trunks. This tool is a button under the column titled **Available/Assigned** which shows the current availability status.

To manage this setting while working in Enterprise Trunking:

1. Locate the Trunk Group in the table listings.
2. Click the button when it shows as *Available* to set it to **Assigned** or click the button when it shows as *Assigned* to set it to **Available**.
3. Click **Save** (top right) when finished to submit the change.

## Manage Associated DIDs

Manage Associated DIDs

This link at the top of the Enterprise Trunking page opens a dialog that allows the Admin to manage the DID associations (Users) for the Enterprise Trunk Groups on the account.

1. Click on the link to open the Enterprise Trunk Management dialog.
2. Select a Trunk ID from the drop-down menu options.
3. Select one or more DIDs you need to manage in either the **Available DIDs** or **Assigned DIDs** section.
4. Choose an action:
  - Click on the **Assign >** button if you wish to move the selection(s) to the **Assigned DIDs** section.
  - Click **< Unassign** to move selections in the **Assigned DIDs** section to the **Available DIDs** section.

*Moved items are placed in the Pending DID(s) section until the user clicks Submit.*

  - Click **< Undo/ Undo >** to return selected items in **Pending** to their original section.
  - Click **Cancel** to quit and exit without making changes.
5. Click **Submit** when finished to save the change(s). These changes are committed immediately and the items in **Pending** are moved to the appropriate section for review.

## Manage Enterprise Trunk Group Priority

Each Trunk listed in the table offers a tool to define the priority. This tool is a data entry field under the column titled **Priority** which shows the current entry for the setting per Trunk Group. An individual Trunk Group's Priority must be an integer between 1 and 10.

To manage this setting in the Enterprise Trunking page:

1. Locate the Trunk Group in the list.
2. Click within the **Priority** field.
3. Select a value (1-10) using the selection tool.
4. Click **Save** (top right) to submit the change.

Trunk Group	Available / Assigned	Priority	W
2100017914-at01	Assigned	10	
2100017914-ph01	Assigned	10	
2057300443TRUNK	Assigned	0	

## Manage Enterprise Trunk Group Weight

Each Trunk listed in the table offers a tool to define the weight. This tool is a data entry field under the column titled **Weight** which shows the current entry for the setting per Trunk Group.

An individual Trunk Group's weight must be an integer between 1 and 65536.

1. Locate the Trunk Group within the table list.
2. Click within the **Weight** field.
3. Define a value (1-65536) using the selection tool.
4. Click **Save** (top right) to submit the change.

Enterprise Trunking

Enterprise Trunk Name: 2100017914-AG/Items

Max # of Service Attempts (max: 10): 10

Max # of Service Attempts within a Priority (max: 10): 8

Mobile Extension Action: Home (selected), Forward to Phone

Trunk Group	Available / Assigned	Priority	Weight	Manage Trunk
2100017914-at01	Assigned	10	10	✓
2100017914-ph01	Assigned	10	50	✓
2057300443TRUNK	Assigned	0	0	

## Manage Enterprise Trunk Group Settings

Each Enterprise Trunk Group listed also provides the Admin with access to review and manage many of the more advanced settings. The Manage Trunk column offers this access via the **Edit** icon adjacent to the listing.

Trunk Group	Available / Assigned	Priority	Weight	Manage Trunk
2100017914-at01	Assigned	10	10	
2100017914-ph01	Assigned	10	50	
2057300443TRUNK	Assigned	0	0	

1. Click on the **Edit** icon adjacent to the selected Enterprise Trunk group within the table to open a new dialog for setting review and maintenance.

**Use caution.** Erroneous modifications to these settings can result in negative service impacts.

The screenshot displays the 'Manage Trunk Group' configuration interface. The left sidebar contains navigation options: Dashboard, Locations, Services & Users, Enterprise Settings, Documents, Contact Directory, and Enterprise Trunking. The main content area is titled 'Manage Trunk Group' and includes the following settings:

- \* Name: 21000179
- Department: None
- \* Maximum Active Calls Allowed: 80
- Maximum Incoming Calls Allowed: 2
- Maximum Outgoing Calls Allowed: 2
- Enable Authentication:
- Authentication User Name: user1
- Type New Authentication Password: [Empty field]
- Trunk Group Identity: 21000179.com@mymim.us
- OTG/DTG Identity: [Empty field]
- Enable Trunk Group Prefix:
- Allow calls directly to trunk group with trunk identity:
- Allow calls directly to trunk group with DTG identity:
- Include trunk identity for call to trunk group:
- Include DTG identity for call to trunk group:
- Enable melon address identity:
- Allow unscreened calls:
- Allow unscreened emergency calls:
- Roads to peering domain:
- Peering Domain: None
- Trunk Group User Lookup Policy:  Use default system policy,  Use this trunk group policy, Extended
- Calling Line Identity Source For Screened Trunk Group Calls Policy:  Use default system policy,  Use this trunk group policy, Profile Name Profile Number
- Support Connected Identity Policy:  Use default system policy,  Use this trunk group policy, Disabled
- First User Calling Line Identity for External Calls Usage Policy: All Originating Calls
- First User Calling Line Identity Usage for Emergency Calls Policy: No Calls
- First User Charge Number Usage Policy: No Calls

At the bottom right of the form, there are 'Save' and 'Cancel' buttons. A mouse cursor is pointing at the 'Save' button.

**Note:** Some settings shown here are read-only within the portal. Contact your telephony System Administrator or Service Provider for assistance with the settings you do not have access to manage.

2. Make changes to the following settings and options (where allowed), as needed:

- \* Name: Provider Access Only.
- Department: Optional – Select a department from the drop-down selection tool, as needed.
- \* Maximum Active Calls Allowed: Provider Access Only.
- Maximum Incoming Calls Allowed: Provider Access Only.
- Maximum Outgoing Calls Allowed: Provider Access Only.
- Enable Authentication: Click within this check box to Enable  or Disable .
- Authentication User Name: Optional - Enter a user name to be used for authentication
- Type New Authentication Password: Optional - Enter the password credential to be used for authentication.
- Trunk Group Identity: Provider Access Only.
- OTG/DTG Identity: Optional – Enter the ID parameter for **Outgoing Trunk Group/Destination Trunk Group** usage.
- Enable Trunk Group Prefix: Click within this check box to Enable  or Disable  and enter the prefix to be used in the field below.

- Allow calls directly to trunk group with trunk identity: Click within this check box to Enable  or Disable .
  - Allow calls directly to trunk group with DTG identity: Click within this check box to Enable  or Disable .
  - Include trunk group identity for call to trunk group: Click within this check box to Enable  or Disable .
  - Include DTG identity for call to trunk group: Click within this check box to Enable  or Disable .
  - Enable network address identity: Click within this check box to Enable  or Disable .
  - Allow unscreened calls: Click within this check box to Enable  or Disable .
  - Allow unscreened emergency calls: Click within this check box to Enable  or Disable .
  - Route to peering domain: Provider Access Only.
  - Peering Domain: Provider Access Only.
  - Trunk Group User Lookup Policy:
    - Select from:
      - Use default system policy
      - Use this trunk group policy ▼
        - Basic or Extended
  - Calling Line Identity Source For Screened Trunk Group Calls Policy:
    - Select from:
      - Use default system policy
      - Use this trunk group policy ▼
        - Profile Name Profile Number
        - Received Name Profile Number
        - Received Name Received Number
  - Support Connected Identity Policy:
    - Select from:
      - Use default system policy
      - Use this trunk group policy ▼
        - Enabled or Disabled
  - Pilot User Calling Line Identity for External Calls Usage Policy:
    - Select from:
      - All Originating Calls
      - Unscreened Originating Calls
      - No Calls
  - Pilot User Calling Line Identity Usage for Emergency Calls Usage Policy ▼
    - Select from:
      - All Originating Calls
      - Unscreened Originating Calls
      - No Calls
  - Pilot User Charge Number Usage Policy ▼
    - Select from:
      - All Originating Calls
      - Unscreened Originating Calls
      - No Calls
3. Click on the [Save](#) button (top right) when finished to submit any changes and close the dialog.

## \*IP Trunking

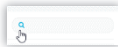
Only organizations that have specialized Trunk Groups will see this section, and only authorized Admonish manage their organization's Trunks should attempt to access to this section's management tools.

Trunk ID	Location	Start Date	IP Address 1	IP Count	Assigned DID's	Group Policy	Service State	Direction	Call Logs	Edit
72385	IPTrunking test location	05/22/2019 11:37:07 AM	1.1.4.100	4	0	round_robin	Inservice	both	Call Logs	
72385	IPTrunking test location	05/22/2019 11:44:06 AM	1.1.4.9	3	0	top_down	block	both	Call Logs	

## Trunking Information

The IP Trunking page offers a searchable table view of the current specialized Trunk Group(s) on the account and offers access to review call logs and manage Trunk Group settings. The display provides views of the Trunk ID, Location, Start Date, IP Address1, IP Count, Assigned DID's, Group Policy, Service State, and Direction (Calls) information for each location.

### Section Search



Enter terms to locate data found within the table below.

### Column Tools

Click the Column *Name* to **!sort!** data by column contents.

Click the *Links* provided within some of the columns to access useful information and/or manage the editable Trunk Group settings.



The **Edit** button opens the selected Trunk Group settings for maintenance.

## Trunk Group IP Count

The IP Count column displays the current count of IPs and access the list of IPs. Click on the number listed within the IP Count column for the Trunk Group to view a pop-up dialog listing the current IPs.



## Manage Associated DIDs

**Use Caution.** Any association changes are committed immediately upon *Submit*.

Authorized Administrators may assign DIDs for IP Trunk Groups. When assigning DIDs to a trunk group or un-assigning DIDs from a trunk group, the selected DIDs are held in the *Pending DID(s)* bucket until Administrator submits the order.

While working in the IP Trunk Group page:

1. Click on the [Manage Associated DIDs](#) link at the top of the IP Trunking page (top right) to open the IP Trunk Management dialog.
2. Complete the following tasks, as needed:
  - Select the appropriate Trunk Group Location from the drop-down list.  
*The current Un-Assigned, Pending, and Assigned DIDs for that IP Trunk Location display below.*
  - Select a DID and use the Assign>, <Undo and <Unassign buttons to move the selected DID(s) to the new status section(s); repeat as needed.
3. Click on the [Submit](#) button when DID assignment changes have been made.

## View Trunk Group Call Logs



The Call Logs offer an informative listing of all calls to and/or from a trunk group within a defined timeframe. The Call Logs view provides filter options that allow the user to reduce or expand the data set. Access to review call log information is provided in two places within the IP Trunk Group section:

- [Call Logs for Locations](#) (IP Trunking page - top right) – This link opens the IP Trunking Call Logs for Location selection and review.
- Individual Locations - The [Call Logs](#) links displayed within the table for each listing open the call log containing data for the selected location.

## Export Call Logs

While working within the Call Logs view, Admins are provided with access to the Export Call logs link to download the current call log display to a report ready .csv spreadsheet format which may be saved to a useful file format in a local folder.

## Manage Trunk Group Settings

Click on the [Edit](#) icon  adjacent to the IP Trunk Group listing (far right column) to open the IP *Trunk Group* page. Fields that cannot be edited display  icon when the cursor is placed on the field. Make any changes to the editable fields.

## Manage IP Trunking Provisioning Information

**Use Caution.** Any associated changes are committed immediately upon *Submit*.

Authorized Administrators may have access to manage IP Trunk Group provisioning information. *While working in the IP Trunking list:*

1. Click on the [Edit](#) icon adjacent to an IP Trunking listing (far right column) to open the IP Trunking - Provisioning Information dialog.

### IP Trunking

Provisioning Information

Trunk ID:	<input type="text" value="72385"/>	Line Description:	<input type="text" value="okayuser"/>
Trunk Location Address:	<input type="text" value="IPTrunking test location"/>	Trunk Start Date:	<input type="text" value="5-22-2019 11:37:07 AM"/>
CNAM Delivery:	<input checked="" type="checkbox"/>	Group Policy :	<input type="text" value="round_robin"/>
International Allowed:	<input checked="" type="checkbox"/>	Service State :	<input type="text" value="inservice"/>
Tech Prefix:	<input type="text"/>	Direction :	<input type="text" value="out"/>
IP Address Node 1:	<input type="text" value="1.1.2.63"/>	IP Address Node 2:	<input type="text" value="1.1.4.4"/>
IP Address Node 3:	<input type="text" value="1.1.2.64"/>	IP Address Node 4:	<input type="text" value="1.2.2.1"/>
IP Address Node 5:	<input type="text" value="1.222.33.255"/>	IP Address Node 6:	<input type="text" value="4.2.2.5"/>
IP Address Node 7:	<input type="text" value="20.20.2.2"/>	IP Address Node 8:	<input type="text"/>
IP Address Node 9:	<input type="text"/>	IP Address Node 10:	<input type="text"/>
IP Address Node 11:	<input type="text"/>	IP Address Node 12:	<input type="text"/>

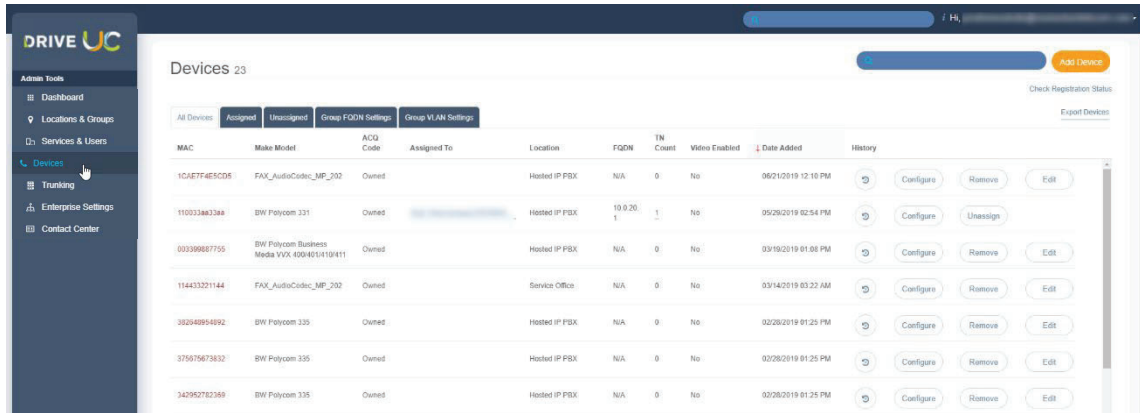
**Note:** Fields that cannot be edited in this view display a read-only  icon when the cursor is hovered over the field.

2. Define the following settings within this dialog to define the IP Trunking behavior, as needed:
  - Trunk ID: Read-only, defined during implementation.
  - Trunk Location Address: Read-only, defined during implementation.
  - CNAM Delivery: Click to Enable  or Disable  CNAM display during calls
  - International Allowed: Read-only, system usage of international dialing defined during implementation.
  - Tech Prefix: Optional. Type the prefix to use.
  - Line Description: Enter the line name displayed in lists/directories.
  - Trunk Start Date: Read-only - displays the start date/time stamp information.
  - Group Policy: Choose a group policy - round\_robin or top\_down
  - Service State: Choose Inservice or block
  - Direction: Read-only - defined during implementation. Displays in or out.
  - IP Address Node 1 - 12: Enter IP Addresses for the nodes to be used in the correct format.
3. Click on the [Submit](#) button when setting assignments or changes have been made.

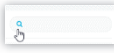







## \*Devices

The *Devices* section of the *Cloud Services Portal* is an advanced Administration tool which requires additional access permissions to be in place and special training to be completed in order for the Admin to see and work with the tools it provides.

The *Devices* section offers a searchable table list view of All Devices, as well as individual lists of the **Assigned** and **Unassigned** devices that have been added into the NEPS *inventory* of the account. Admins may also have access to **Add**, **Configure**, **Unassign/Remove** devices, or **Export** the list of devices and their current setting information to a .csv spreadsheet. The information provided for each device listed within the table includes MAC address, Make Model, ACQ Code, **Assigned To**, Location, FQDN, TN Count, and whether it is Video Enabled.



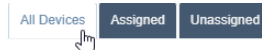
Function icons to the right of each device listing offer access to review the device’s activity **History**, **Configure** the device, **Unassign** the device, **Edit** unassigned device inventory data, or **Remove** an Unassigned device.

<p><b>Section Search</b></p>  <p>Locate data found within the table view below.</p>	<p><b>Add Device</b></p>  <p>The <b>Add Device</b> button allows an authorized Admin to add new devices to inventory one at a time. Once added, the device(s) may be configured and assigned to users.</p>	<p><b>Export Devices</b></p> <p><a href="#">Export Devices</a></p> <p>The <b>Export Devices</b> link downloads a .csv spreadsheet containing the list of devices and their current settings for review or reporting.</p>
<p><b>Tab Views</b></p>  <p>Click a tab to review listed information for <b>All Devices</b>, <b>Assigned</b> or <b>Unassigned</b> Devices and Manage Group VLAN or FQDN Settings.</p>	<p><b>Column Link(s)</b></p> <p><b>Assigned To</b> and <b>TN Count</b> links provide access to review the device’s assignments/numbers and link to the <b>Services &amp; Users</b> page listing.</p>	<p><b>History</b></p>  <p>Provides access to review the entire history of activity for the selected device.</p>
<p><b>Configure</b></p>  <p>Opens a new view where the user may define or edit the configuration data for the selected device.</p>	<p><b>Check Registration Status</b></p> <p>Poll NEPS / BroadSoft provisioned device registration status. Registration data is updated, and the latest poll time stamp is displayed.</p>	<p><b>Unassign</b></p>  <p>Allows authorized users to delete the current assignment for a device, or <b>Unassign</b> and <b>Remove</b> the device from inventory.</p>
<p><b>Remove</b></p>  <p>Remove unassigned devices from inventory counts and assignment/selection availability within the portal.</p>	<p><b>Edit</b></p>  <p>Modify Unassigned device inventory data.</p>	

## View Device Lists

Access to review and manage the account's devices in inventory is provided in the Admin Dashboard via the Devices card and the Quick View card for authorized administrators.

- ❖ The Devices section is also accessible via the menu listing in the Navigation panel on the left.
- ❖ The tabs at the top of the **Devices** page offer access to review the device lists for **All Devices**, **Assigned** and **Unassigned** devices.
- ❖ The default view is All Devices.



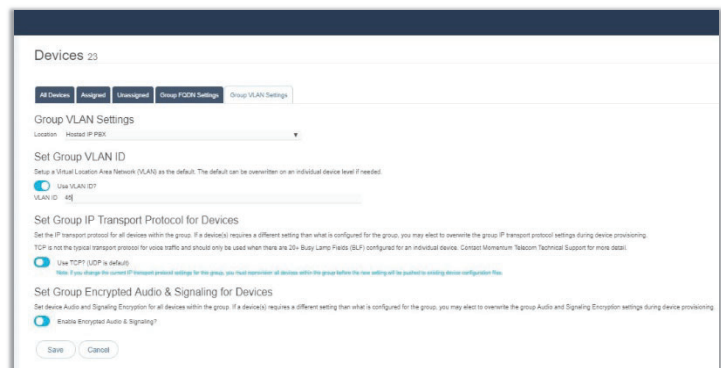
While in the Devices section, click on a tab at the top of the page to view related lists of devices in inventory (if any) and to access the inventory management tools for those devices.

## Group VLAN Settings

This Devices page allows an Admin to manage the default **Virtual Location Area Network (VLAN) ID**, **IP Transport Protocol**, and **Audio and Signaling Encryption** for each location's devices.

Note: Individual devices within the Group may be setup with alternate VLAN IDs or Encryption during provisioning or configuration, and changes to some settings in this tab may require all devices assigned to the Group to be re-provisioned prior to configuration updates taking effect.

1. Click on the Group VLAN Settings tab.
2. Select a Location from the drop-down menu options.
3. Enable and define the following settings, as needed to define defaults for the group:



### Set Group VLAN ID

- 👤 **Use VLAN ID?** On/Off setting. Click to slide the toggle to ON and enter the VLAN ID in the field provided. Must be between 2 and 1001, or between 1006 and 4094.

### Set Group IP Transport Protocol for Devices

- 👤 **Use TCP?** On/Off setting. Click to slide the toggle to ON as needed to use TCP as the IP transport protocol rather than UDP (default).

Note: TCP is not the typical transport protocol for voice traffic and should only be used when there are 20+ Busy Lamp Fields (BLF) configured for one or more individual devices in the group (E.g., Receptionist sidecar device). If the current IP transport protocol settings for this group are changed (Enabled or Disabled), all devices within the group must be re-provisioned before the new setting will be pushed to device configuration files. Contact Technical Support for assistance, as needed.

### Set Group Encrypted Audio & Signaling for Devices

- 👤 **Enable Encrypted Audio & Signaling?** On/Off setting. Click to slide the toggle to ON as needed for usage.
4. **Save** - Click on the Save button to update the system with any changes.

## Group FQDN Settings

The default Fully Qualified Domain Name (FQDN) can be defined for each Location/Group in the Devices page. The FQDN can also be managed at the individual device level when editing the configuration.

While working in **DEVICES**:

1. Click on the **Group FQDN Settings** Tab.
2. Location - Choose a location option from the drop-down menu list.
3. Current FQDN – Read Only. Displays any current default FQDN assignment for the location.
4. Available FQDN – Click within the field to open the drop-down selection list and choose an option from the FQDNs that are available for selection.
5. **Save** - Click the **Save** button to update the system with the new information.

## Add a Device

**Add Device**

The **Add Device** button opens a new view where an authorized Admin can enter new device information into inventory, including the type, MAC address, and location for its usage.

While working in *Devices*:

1. Click on the **Add Device** button to begin.
2. Enter or select the correct options for the following:
  - **MAC Address** – Type the MAC address in the correct format. Assistance is provided if the entered format is incorrect.
  - **Device Type** – Select the correct type in the drop-down menu.
  - **Location** – Select the correct location from the drop-down menu.
  - **Device Notes** – Optional. Enter any useful information about the new device in the field provided.
3. Click the **Save** button to update the system with the new information and close the dialog, **OR**
4. Click the **Save & Add Another Device** button to save the information and define the settings for another device in inventory.


## Export Device Setting/Configuration Information

**Export Devices**

The **Export Devices** link at the top of the **Devices** section view allows users to download the current list of devices along with the information shown within the Devices list to a .csv spreadsheet for reporting or distribution.

## View Device Activity History

 The History column of the Devices page offers quick button access to review the activity (provision, configuration, and assignment) history of each device. *While working in Devices:*

1. Click on the **History**  button adjacent to a device to instruct the system to open a new dialog and load the device's activity history for review.
2. Click the **Close** button to exit the dialog and return to the Devices list view.

## Check Registration Status

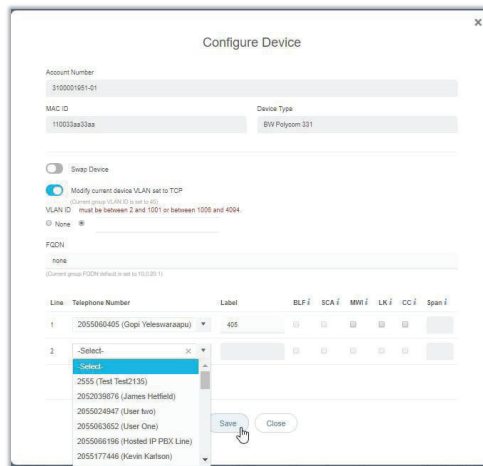


The Check Registration Status link (top right of the main Devices page) polls NEPS and BroadSoft for the latest registration information and updates the devices in the list with that new data, as needed. The date and time of the latest check is displayed to Admins as a reference. Note: The review and update process may take a few moments to complete.

## Configure a Device



The **Configure** button next to a device in the list opens a dialog that allows an authorized Admin to define the configuration or make modifications to the current configuration settings for a selected device. The information icons in the dialog offer helpful setting information.



**Configure Device**

Account Number: 310001661-01

MAC ID: 110033aa33aa Device Type: BW Polycom 331

Setto Device

Modify current device VLAN's set to TCP  
(Current group VLAN is set to 404)

VLAN ID: must be between 2 and 1021 or between 1026 and 4094

None  \*


FQDN: none  
(Current group FQDN default is set to 10.0.0.1)

Line	Telephone Number	Label	BLF	SCA	MWI	LK	CC	span
1	2055006405 (Gopi Yelavartapu)	405						
2	-Select-							

Save Close



Note: Device configuration options are dependent on the BroadWorks features and services that are enabled for use by the organization.

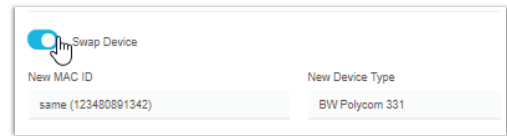
*While working in Devices:*

1. Click on the **Configure** button adjacent to a Device in the list to open the Configure Device dialog.
2. Select or specify the device configuration options, as needed, or required.  
*(Note: The information displayed in darker gray fields is read-only.)*
3. Define the Telephone Number, Label (extension), and service/feature behavior options for each Line.
4. Information about each service setting is provided by clicking on the adjacent  icon.
5. Click **Save** when all necessary configuration information for the device has been defined. The system updates and the dialog closes.



## Swap Device

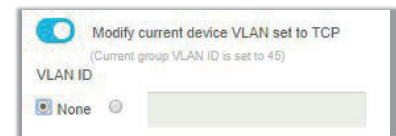
While working in *Configure Device*:

1. Click to toggle the  **Swap Device** setting switch to **ON**.
2. Select the **New MAC ID** from the drop-down list.
3. Select the **New Device Type** from the drop-down list of available options.  
OR – Click the setting toggle switch to *disable*. 
4. Click **Save** to update the information and close the dialog. OR  
– Click **Close** to exit the dialog without making changes.



## Modify Current Device VLAN Set to TCP

1. Click to toggle  the switch to **Enabled** or **Disable**. 
2. Click to select **None**, OR  
Click to select the other radio button and enter a **VLAN ID** in the adjacent text field (must be between 2 and 1001 OR between 1006 and 4094 and the current Group VLAN ID is shown - in this example the default is 45.)
3. Click **Save** to update the information  
- Or click **Close** to quit and exit.



## Set Device FQDN Assignment

While working in *Configure Device*:

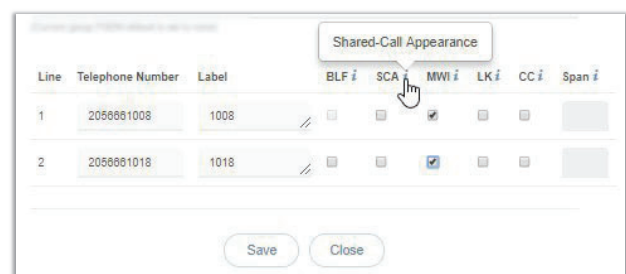
1. Click within the **FQDN** field to select from the available *Fully Qualified Domain Name* options in the drop-down list.
2. Click **Save** to update the information or click **Close** to quit and exit.



## Set Device Line Assignments

While working in *Configure Device*:

1. Define the following information for each line on the device (line 1, line 2, etc.), as needed:
  - **Telephone Number** – Locate and select a telephone number or name for the line from the drop-down list of available options.
  - **Label** – Enter the extension or select from the drop-down list of available options.
  - **BLF** – Click to place a check in the corresponding checkbox to enable *Busy Lamp Field* (presence information) for any secondary line(s).
  - **SCA** – Click to place a check in the corresponding checkbox to enable *Shared*




*Call Appearance* for the line. SCA is not available to be selected for a line if the service (telephone number) is not already provisioned on another device.

- MWI – Click to place a check in the corresponding checkbox to enable *Message Waiting Indicator* on the line. Recommended.
  - LK – Click to place a check in the corresponding checkbox to enable *Line Key Span* on the line.
  - CC - Click to place a check in the corresponding checkbox to enable / require *Contact Center Agent Sign-On* for the line.
  - Span – Enter the number of line keys (digits) to be used for agent login in the space provided.
2. Click [Save](#) when all necessary configuration information for the device has been defined. The system updates and the dialog closes.

## Modify Device Configuration

While working in *Devices*:

1. Select a device within one of the **Device** Tab lists.
2. Click the **Configure**  button adjacent to it.
3. Make changes to the current device settings or line features, as needed.
4. Click [Save](#) when all necessary configuration changes for the device have been defined. The system updates and the dialog closes and returns focus to the *Devices* list view.

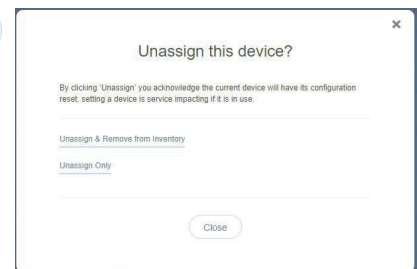
## Unassign a Device

While working in *Devices*:

1. Click on the **Unassign** button adjacent to the device to be unassigned.



Admins have **two** options when Unassigning devices – to remove the assignment only **or** to remove the assignment and delete the device from inventory.



### Device - Unassign Only

1. Click on the **Unassign Only** link in the Unassign this device? dialog to remove current line/service assignments but keep the selected device available in inventory to allow for reassignment/configuration.

### Device - Unassign and Remove from Inventory

**Use Caution.** This action cannot be undone.

1. Click on the **Unassign & Remove from Inventory** link in the Unassign the device? dialog to remove the assignments AND delete the selected device from inventory.
2. Click **Yes** to confirm the action if prompted. The device (and any assignments or configurations) is deleted.

## Manage Unassigned Devices

Devices that are not currently assigned are listed in the All Devices and the Unassigned tabs when reviewing the *Devices* section. Besides the *History* and *Configure* tools, additional management tools are provided for any currently Unassigned devices to assist admins with device management tasks.

MAC	Make Model	ACQ...	Assigned To	Location	FQDN	TN ...	Video Enabled	History
64167B01516	BIW Polycom...			Hosted IP PBX	N/A	0	false	

The additional tools include:

- Edit** Edit – Select this button to edit the device inventory information before configuring and assigning it.
- Remove** Remove – Select this button to remove the unassigned device from inventory immediately.

### Edit Unassigned Device Inventory Data

Once a device has been added or has been unassigned, an authorized Admin may edit the associated inventory data (MAC Address, Type, Location and User assignments...).

*While working in Devices:*

- Select an Unassigned device in the list.
- Click the **Edit** button adjacent to it to begin editing the inventory information.
- Select or specify the following:
  - **MAC Address** – Enter or Edit the MAC Address. Correct formatting information is provided if entered in error.
  - **Device Type** – Select the correct device type from the drop-down list of options.
  - **Location** – Select the correct Group/Location from the drop-down list of options.
  - **Device Notes** – Enter short notes about the device.
- Click **Save** to update the system with the new device information, close the dialog, and return to the Devices list.

### Remove an Unassigned Device from Inventory

*While working in Devices:*

- Select an Unassigned device in the list.
- Click on the adjacent **Remove** button for the listing.
- Click the **Remove from Inventory** link to delete the unassigned device from inventory and return to *Devices* to review the updated list.

### Add a Fully Qualified Domain Name (FQDN)

In the **Enterprise Settings** view:

1. Click the **Edit** icon adjacent to FQDN Setup.
2. Enter a new Fully Qualified Domain Name in the text field.
3. Click **Save** when finished to update the list of available FQDNs and close the dialog.

### Delete a Fully Qualified Domain Name (FQDN)

**Use caution.** This action is immediate and cannot be undone and devices setup to use the deleted FQDN must be edited to select an existing FQDN.

In the **Enterprise Settings** view:

1. Click the **Edit** icon adjacent to FQDN Setup.
2. Click the **Delete** button adjacent to an existing FQDN listing.
3. Click **Save** when finished to close the dialog.

**FQDN Setup**

Add and remove Fully Qualified Domain Names (FQDNs) to be used by devices:

New FQDN

Existing FQDNs:

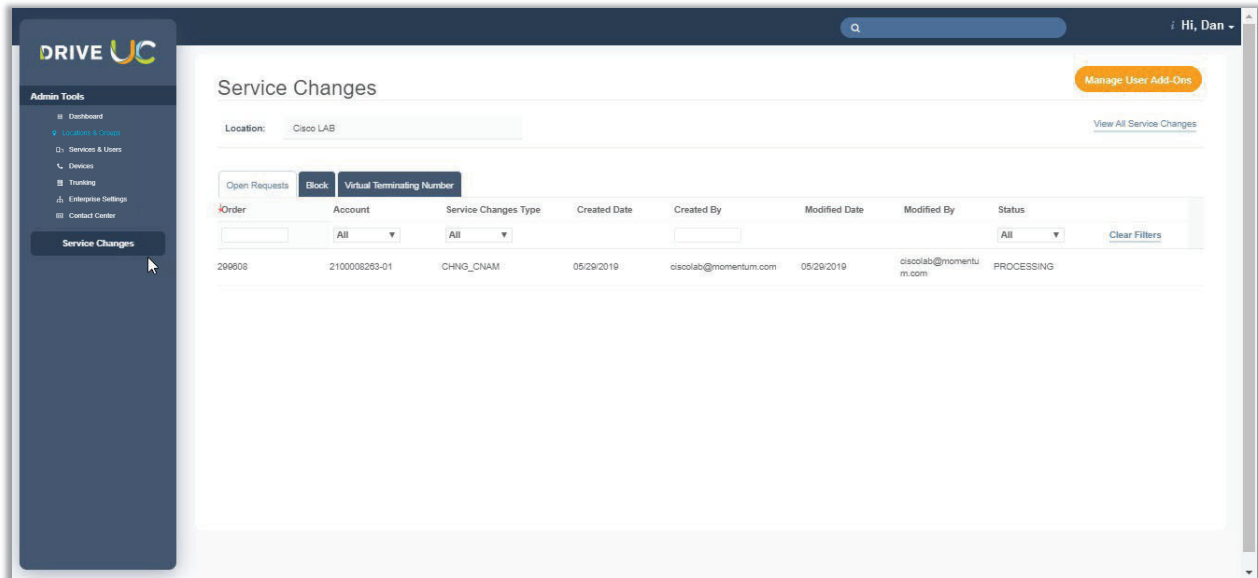
4.2.2.2	Delete
10.10.10.1	Delete
10.1.10.10	Delete
rent-east.myntm.us	Delete
172.20.0.1	Delete

Save Cancel

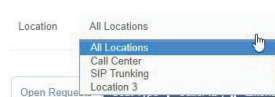
## \*Service Changes

The Service Changes section of the Cloud Services Portal is an advanced Administration tool which requires additional access permissions to be in place and special training tube completed in order for the Admin to be granted access to see and work with the tools it provides.

The Service Changes page provides a searchable list of the current service orders for the account and the current status of each. Tools are provided to view services by Location, Add Services, Manage User Add-Ons, View All Service Changes (historical activity), Edit and Terminate incomplete orders, or Delete open service change orders. Information and useful system notifications are provided throughout this area to assist Super Admins with Service Change tasks.



The primary Service Change tools listed at the top of the page include:



Select the **Location** to be managed/reviewed from the drop-down selection tool above the tabs and then choose a tab or action button to begin performing tasks.



Opens the **Add Service** view to allow selection and configuration of new service requests/orders.



Opens the **Manage User Add-ons** view of the current Add-on assignments, sortable by location and Un-Assign Add-ons to allow reassignment/Change.



Opens the **All Service Changes** view to display a sortable list of all service change requests that have been entered and their status (Open, Submitted, Discarded, Processing). Context sensitive tools are provided to View, Edit, Delete and/or Terminate, based on the current status of the order.

The default view when the Service Changes page displays is **Open Requests** for **All Locations**. Information is provided in a sortable table view. Tabs above the table offer access to all of the service change areas and the tools to perform related actions and tasks.

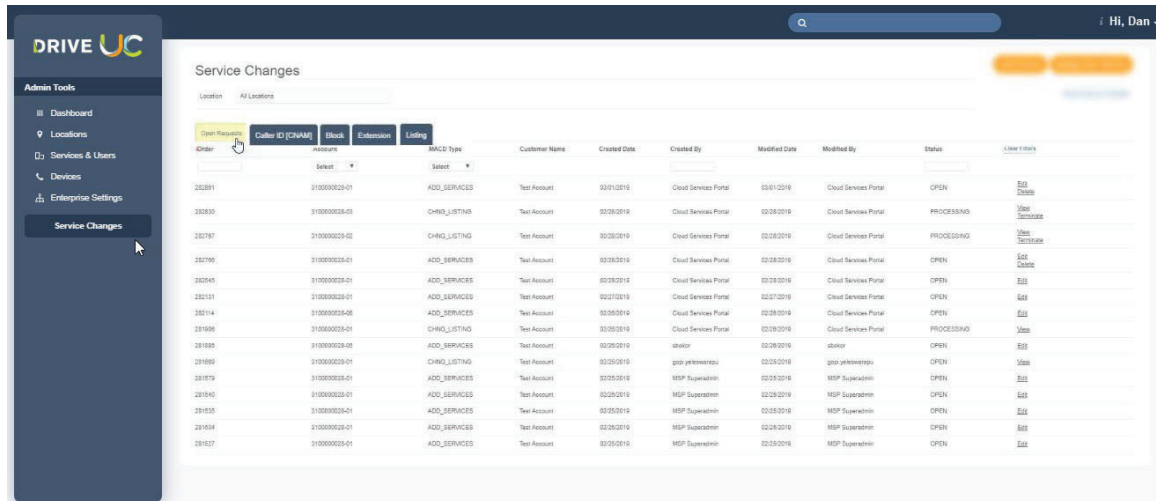
The **Change** management areas are only non-billable and may include sections like:

**Open Requests, Caller ID [CNAM], Block, Extension, and Virtual Terminating Number.**



## Open Requests

The default view when the Service Changes section first displays is Open Requests for All Locations.



This view may be filtered and sorted using the **Location** selection tool, table **Column Headers**, and the **Order**, **Account**, **MACD Type**, **Created By** and **Status** filter tools within the table.

### View Open Requests by Location

Click on the Location drop-down at the top of the page and select an available option to filter the view by Open Requests for the selected location.

### Sort Open Requests

Click on the **Column Headers** in the Open Requests view to sort the data in ascending or descending order alphanumerically based on the values within the selected column.

### View Open Requests by Location

The list of open and processing Service Change order requests may also be filtered by:

Order	Account	MACD Type	Created By	Status
<p><b>Order</b></p> <p>Type an order number or part of an order number to filter the list to show only matching items. The table will dynamically update, and filter further as matching numbers are entered.</p>	<p><b>Account</b></p> <p>Select an account number option from the drop-down list to only show open requests for that account.</p>	<p><b>MACD Type</b></p> <p>Select an available MACD type option from the drop-down list to show only that type of open request in the table below.</p>	<p><b>Created By</b></p> <p>Type a name or part of a name to filter the list by a creator. The drop-down also displays all service change creators as selection options.</p>	<p><b>Status</b></p> <p>Drop-down selection tool which allows users to filter the list by order status.</p>

### Clear Filters

Click this link above the far right column to remove filters and return to the default sort and display order.

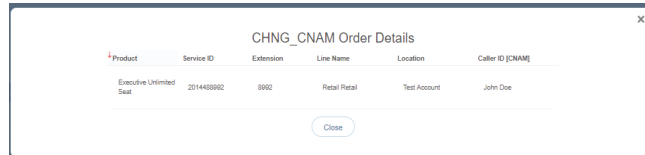
### View a Service Change Order

When a service is added and in an Open or Processing status, it is listed for review in the Open Requests tab.

1. Click the [View](#) link adjacent to the item in the far right column to open the read-only *Order Details* view.

278478	3100000028-01	ASSIGN_USER_ADDON	Test Account	02/07/2019	matt.warren	02/07/2019	matt.warren	OPEN	<a href="#">View</a>
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2. Click [Close](#) when finished to exit the dialog and return to the list of Service Change requests.



### Edit a Service Change Order

If a service change order can be edited, the option to do so is provided.

1. Click on the [Edit](#) link adjacent to an item in the far right column to open the item in *Edit* mode.

Order	Account	MACD Type	Customer Name	Created Date	Created By	Modified Date	Modified By	Status	
282801	3100000028-01	ADD_SERVICES	Test Account	03/01/2019	Cloud Services Portal	03/01/2019	Cloud Services Portal	OPEN	<a href="#">Edit</a>

2. Make changes to the order, service configuration, quantity, etc., as needed.

**Note:** Each service change type requires specific information for configuration. The system will assist users and notify if any missing information is discovered during the auto-confirmation process it completes prior to allowing the order to be submitted.

3. Click [Save](#) when finished to submit the updates/changes for processing.

### Delete a Service Change Order

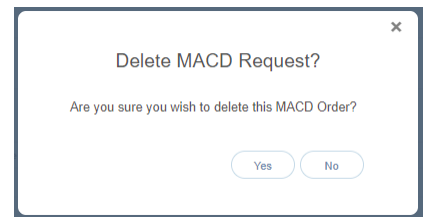
If a service change order can be deleted, the option to do so is provided.

1. Click on the [Delete](#) link adjacent to the desired item in the far right column.

Cloud Services Portal	OPEN	<a href="#">Edit</a>
Cloud Services Portal	OPEN	<a href="#">Delete</a>

2. Click [Yes](#) when prompted to confirm the action.

The service change order is deleted, and the system updates the list of Open Requests. The history of the action is also recorded and may be reviewed by clicking on the [View All Service Changes](#) link at the top of the Service Changes section.



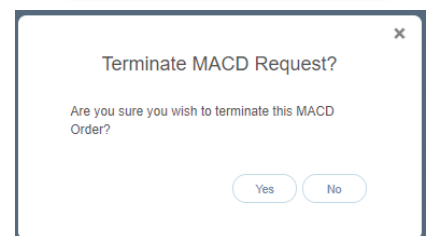
### Terminate a Service Change Order

If a service change order can be terminated, the option to do so is provided.

1. Click on the [Terminate](#) link adjacent to an item in the far right column.

Cloud Services Portal	PROCESSING	<a href="#">View</a>
Cloud Services Portal	PROCESSING	<a href="#">Terminate</a>
Cloud Services Portal	OPEN	<a href="#">Edit</a>

2. Click [Yes](#) when prompted to complete the termination.



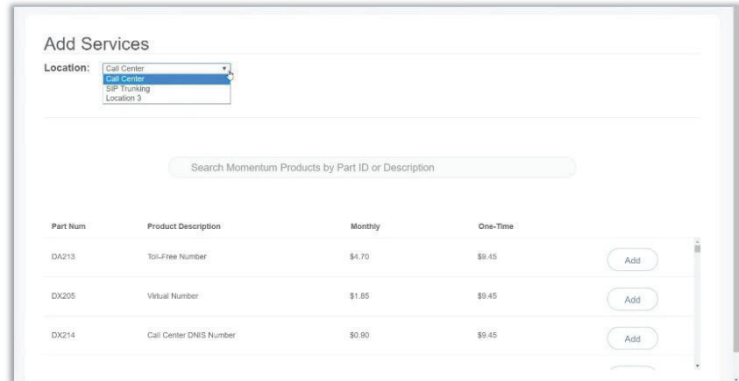
## Add Services



Where enabled, this button offers Advanced access to create and submit a new service order for a location on the account.

### Add a Service Change Order

1. Click the **Add Services** button to open the *Add Services* view.
2. Choose a **Location** from the drop-down selection tool.
3. Choose the desired service by:
  - a. Enter a term in the *Search* tool above the list. Scroll through the list of available items.
4. Click the **Add** button adjacent to a desired item to select it. The selected item is displayed at the top of the page to allow for *configuration*.



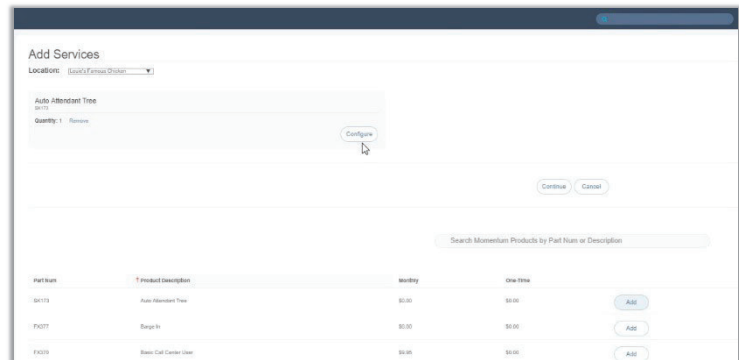
The screenshot shows the 'Add Services' interface. At the top, there is a 'Location' dropdown menu with options: 'Call Center', 'Call Center', 'Call Forwarding', and 'Location 3'. Below this is a search bar labeled 'Search Momentum Products by Part ID or Description'. A table lists services with columns for 'Part Num', 'Product Description', 'Monthly', and 'One-Time' prices. Each row has an 'Add' button.

Part Num	Product Description	Monthly	One-Time
DA213	Toll-Free Number	\$4.70	\$9.45
DX205	Virtual Number	\$1.85	\$9.45
DX214	Call Center DNS Number	\$0.90	\$9.45

Most service change types require specific configuration information in order to submit for processing.

**Note:** At any time, users may stop the add process.

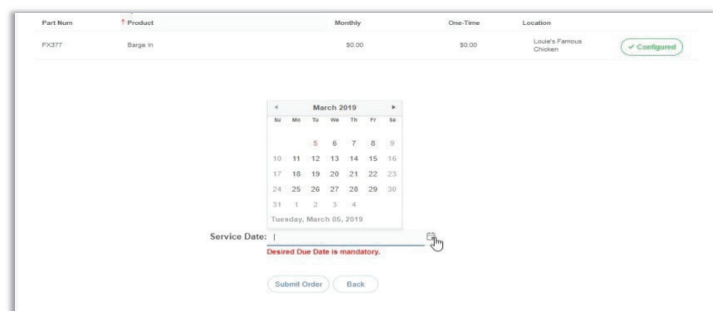
Click **Remove** to delete the item from the order and click **Yes** to confirm and re-select something else; or click **Cancel** to discard the order and click **Yes** to confirm.

The screenshot shows the configuration step. The 'Location' dropdown is set to 'Local/Fax/Order'. Below it, the 'Auto-Attend Time' is set to '0:00'. There is a 'Quantity' field with '1' and a 'Remove' button. A 'Configure' button is highlighted. Below the configuration fields is a table of services with columns for 'Part Num', 'Product Description', 'Monthly', and 'One-Time' prices. Each row has an 'Add' button.

Part Num	Product Description	Monthly	One-Time
DA113	Auto-Attend Time	\$0.00	\$0.00
FX077	Range In	\$0.00	\$0.00
FX033	Basic Call Center User	\$9.45	\$0.00

5. Click **Configure** to view configuration details.
6. Enter all **required** and any useful information for configuration of the selected item.
7. Click **Save**. The system will review and then either provide a **Success!** message or indicate that there is missing/required configuration information and will provide an opportunity to revise and **Save** again.
8. Repeat steps 3 – 7 for any other services to be added to this location in this order.
9. Click **Continue** to proceed to order submission.
10. Enter or select an appropriate begin **Service Date** (*today* is highlighted).
11. Click **Submit Order** when finished to send the new service order and view the *Order Confirmation* page.



The screenshot shows the service date selection step. A calendar for March 2019 is displayed, with the 5th of March highlighted. Below the calendar, the 'Service Date' field is set to 'Tuesday, March 05, 2019'. A red error message states 'Desired Due Date is mandatory.' Below this are 'Submit Order' and 'Back' buttons.

During validation, the system will note any current services or products that are inconsistent or incompatible with a new order selection - as well as those that already exist and do not need to be re-ordered - and then inform the user.

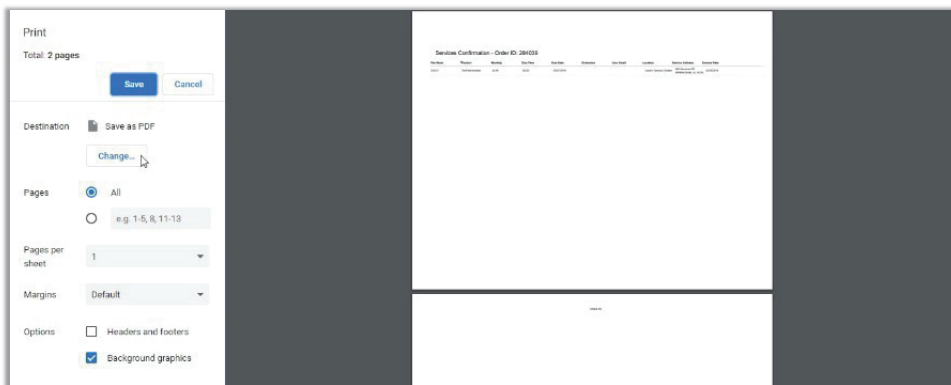
## Print Service Change Confirmation

While viewing the *Services Confirmation* page after submitting a Service Change, the option to **Print Confirmation** is provided at the bottom of the page.

Services Confirmation - Order ID: 284039									
Part Num	Product	Monthly	One-Time	Due Date	Extension	Line Email	Location	Service Address	Service Date
DA213	Toll-Free Number	\$4.05	\$0.00	03/07/2019			Louie's Famous Chicken	880 Montclair RD BIRMINGHAM, AL 35213	03/29/2019

[Print Confirmation](#)

1. Click on the [Print Confirmation Link](#) to open the Print dialog.
2. Accept the default settings (PDF, All pages, to local file...) or select from the following print options:
  - Destination: Click [Change](#) to specify the print type and file location.
  - Pages: Specify the number of pages to print.
  - Pages per sheet: Specify as needed.
  - Margins: Define as needed.
  - Options: Click to place checkmarks in the checkboxes for Headers and footers and Background Graphics to include in the final print copy.
3. Click [Save](#) when finished to download a copy of the order confirmation.





## Manage User Add-Ons

### Manage User Add-Ons

When available, the **Manage User Add-Ons** button (at the top of the Service Changes page views) opens the *Manage User Add-Ons* section where users have access to review current user-level add-on services for each location on the account and assign and un-assign those add-ons.

Add-On	Available	Assigned	Remaining	Management
Momentum Mobility with Messenger	4	0	4	Assign
Barge In	1	1	0	Un-Assign
Momentum Mobility Desktop Softphone	3	2	1	Assign, Un-Assign
Momentum Mobility View	1	1	0	Un-Assign
Momentum Connector	2	0	2	Assign
Call Reporting Lite Extension	1	0	1	Assign
Call Reporting Plus or Call Reporting Pro Extension	1	1	0	Un-Assign
Call Reporting Pro Agent	1	1	0	Un-Assign

- ❖ This view provides access to lists of the current user add-on services.
- ❖ Filter the view using the Location selection tool at the top of the page(required).
- ❖ Each item in the list offers details that include:
  - ❖ **Add-On** (service name)
  - ❖ Available, Assigned and Remaining add-on counts
  - ❖ Management tools to **Assign**  available add-ons and **Un-Assign**  add-ons.

*Note: Assigned User Add-Ons must be Un-Assigned prior to a Service Change request.*

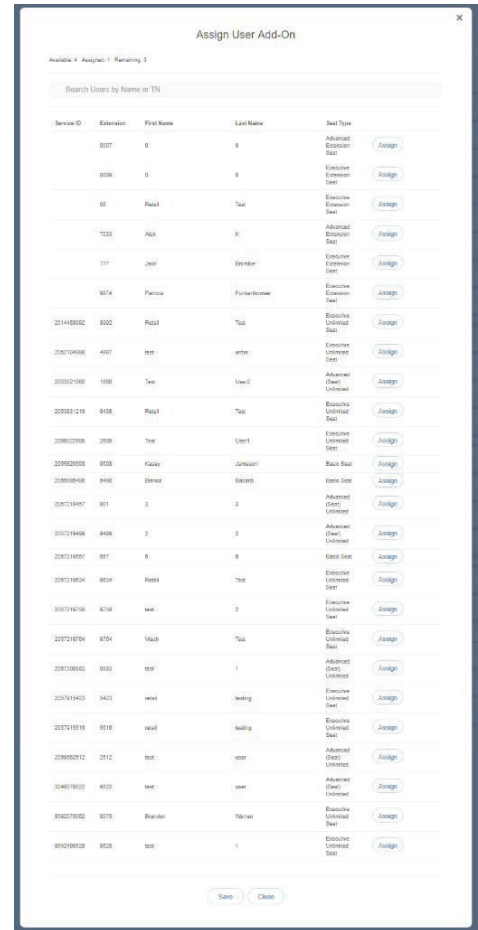
### Assign a User Level Add-On

Assign

The **Assign** management tool is available to use for User Add-ons that have a count of 1 or more under **Remaining**.

1. Click the **Assign** button adjacent to an Add-On (far right column).  
*The list of available users with compatible services displays for selection.*
2. Locate the user(s) to be assigned the Add-On:
  - a. Scroll through the list to locate the appropriate user.
  - b. Use the Search tool at the top of the list to filter the list by name or telephone number (TN).
3. Click on the **Assign** button next to the desired user to assign the add-on.
4. Repeat for any other users if there are multiple Add-Ons available.
5. Click **Save** when finished to submit the change in User Add-On assignment(s), close the dialog and return to the Manage Add-Ons view.

*The system updates the counts under Available, Assigned, and Remaining for the User Add-On changes just entered.*



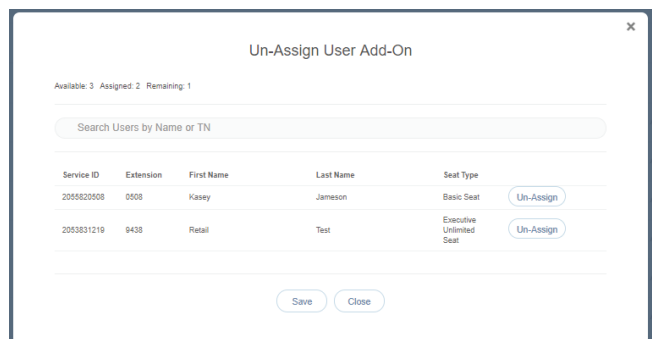
### Un-Assign a User Level Add-On

Un-Assign

The **Un-Assign** management tool is available for User Add-ons that have a count of one (1) or more under **Assigned**.

1. Click on the **Un-Assign** button adjacent to an Add-On (far right column).
2. *The list of current Add-On Assignments displays.*
3. Click on the **Un-Assign** button next to the desired user to remove the assignment.
4. Repeat for any other users if there are multiple Add-Ons to be unassigned.
5. Click **Save** when finished to submit the change in User Add-On assignment(s), close the dialog and return to the Manage Add-Ons view.

*The system updates the counts under Available, Assigned and Remaining for the User Add-On changes just entered.*



## View All Service Changes

### [View All Service Changes](#)

Click the [View All Service Changes](#) link for Admin access to view a table listing of historical and current Service Change orders, including those that were Discarded or Terminated, and to perform management tasks to View, Edit, Delete, or Terminate any orders in the process queue.

Order	Account	Service Changes Type	Created Date	Created By	Modified Date	Modified By	Status	
<input type="text"/>	All ▼	All ▼	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All ▼	<a href="#">Clear Filters</a>
293416	3100000028-01	ADD_SERVICES	04/24/2019	3999347877uy@ykkkkku.com	04/24/2019	3999347877uy@ykkkkku.com	OPEN	<a href="#">Edit</a> <a href="#">Delete</a>
291648	3100000028-01	ADD_SERVICES	04/16/2019	matt.warren	04/16/2019	matt.warren	OPEN	<a href="#">View</a>
291521	3100000028-13	ADD_SERVICES	04/15/2019	jdewoody	04/15/2019	jdewoody	COMPLETED	<a href="#">View</a>
291416	3100000028-01	ADD_SERVICES	04/14/2019	3999347877uy@ykkkkku.com	04/14/2019	3999347877uy@ykkkkku.com	DISCARDED	<a href="#">View</a>
291404	3100000028-13	ADD_SERVICES	04/12/2019	jdewoody	04/12/2019	jdewoody	COMPLETED	<a href="#">View</a>
290757	3100000028-01	ADD_SERVICES	04/10/2019	3999347877uy@ykkkkku.com	04/10/2019	3999347877uy@ykkkkku.com	COMPLETED	<a href="#">View</a>
289914	3100000028-01	ADD_SERVICES	04/05/2019	3999347877uy@ykkkkku.com	04/05/2019	3999347877uy@ykkkkku.com	COMPLETED	<a href="#">View</a>
289906	3100000028-01	ADD_SERVICES	04/05/2019	3999347877uy@ykkkkku.com	04/05/2019	3999347877uy@ykkkkku.com	OPEN	<a href="#">Edit</a> <a href="#">Delete</a>
289413	3100000028-01	ADD_SERVICES	04/03/2019	3999347877uy@ykkkkku.com	04/03/2019	3999347877uy@ykkkkku.com	COMPLETED	<a href="#">View</a>
289346	3100000028-01	ADD_SERVICES	04/03/2019	3999347877uy@ykkkkku.com	04/05/2019	3999347877uy@ykkkkku.com	DISCARDED	<a href="#">View</a>

Information for the Service Changes is listed in an easy-to-read table format showing the most recent service changes first by default.

Data within the table includes:

- ❖ **Order** – The order number for the Service Change
- ❖ **Account** – The Location identifier
- ❖ **Service Changes Type** – The service change type
- ❖ **Customer Name** – The parent account
- ❖ **Created Date** – The day the service change was created
- ❖ **Created By** – The Admin who created the service change
- ❖ **Modified Date** – The date of the last change to the order
- ❖ **Modified By** – The Admin who last modified the order
- ❖ **Status** – The current status (Open, Submitted, Processing, Discarded) of the order

Admins with appropriate access can perform some or all of the following administrative activities in this view:

- ❖ **Sort** – The column headers may be used to sort the data in ascending/descending alpha-numeric order.
- ❖ **Filter** – The data in the table may be filtered using the tools above the table to modify the view by *Order (number)*, *Account (select)*, *Type (select)*, *Created By (name)* and by *Status (Open, Submitted, Processing and Discarded)*.
- ❖ **Clear Filters** – This link removes any filter selections and resets the table to the default sort order.
- ❖ **Actions** – The action link options (*View, Add, Delete, Terminate*) adjacent to each listing in the far right column are dynamically provide the correct actions that can be performed based on the current status of the service change order.

### View Service Change Details

1. Click [View](#) next to an item to review the read-only information about the service change order.
2. Click [Cancel](#) when finished.

### Edit an Active Service Change

This action is available when editing is permissible.

1. Click on the [Edit](#) link next to the desired item to open the Add Services view where editing is permitted.
2. Click the [Configure](#) button to update or modify quantity, name, numbers etc.

**Note:** Each service change type requires specific information for configuration. The system will assist users and notify if any missing information is discovered during the auto-confirmation process it completes prior to allowing the order to be submitted.

3. Locate, select, and configure additional services (as needed).

### Delete a Service Change

This action is available to select when permissible within the process.

Completed orders cannot be deleted.

**Use Caution:** This action cannot be undone.

1. Click the [Delete](#) link option adjacent to a Service Change order listing.
2. Click [Yes](#) to confirm the action when prompted.

## Caller ID (CNAM)

If enabled, allows Admins to manage/*change* the Caller ID to be displayed for lines in each location on the account. In this tab, Column headers may be used to sort the list alphanumerically. A section search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, and Location.

1. Click on the Caller ID [CNAM] tab.
2. Select the appropriate [Location](#) at the top of the page to display the assigned lines. Locate the service to be receive a CNAM change within the list
3. Caller ID [CNAM]: Type the name to be displayed to receivers when Caller ID is in use.
4. Repeat for any additional Caller ID [CNAM] changes to other listings.
5. Click [Save](#) to submit the changes for processing,  
Or click [Cancel](#) and confirm when prompted to discard changes.

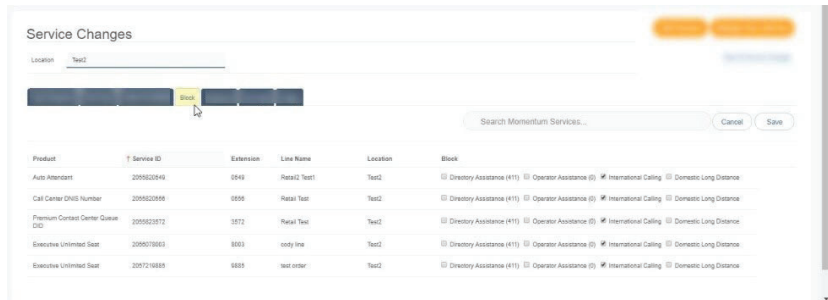
The screenshot shows the 'Service Changes' interface with the 'Caller ID (CNAM)' tab selected. The table below lists the service lines:

Product	Service ID	Extension	Line Name	Location	Caller ID (CNAM)
Auto Attendant	2059820549	0540	Retail Text	Test2	<input type="text" value="Retail Text"/>
Call Center CNAM Number	2059820598	0598	Retail Text	Test2	<input type="text" value="Retail Text"/>
Premium Contact Center Queue DID	2059820772	3072	Retail Text	Test2	<input type="text" value="Retail Text"/>

## Block

Manage/change settings that block specific call types from lines in each Location on the account. In this tab, Column headers may be used to sort the list alphanumerically. A section search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, and Location. Simple On/Off checkbox tools for the block setting options are provided.

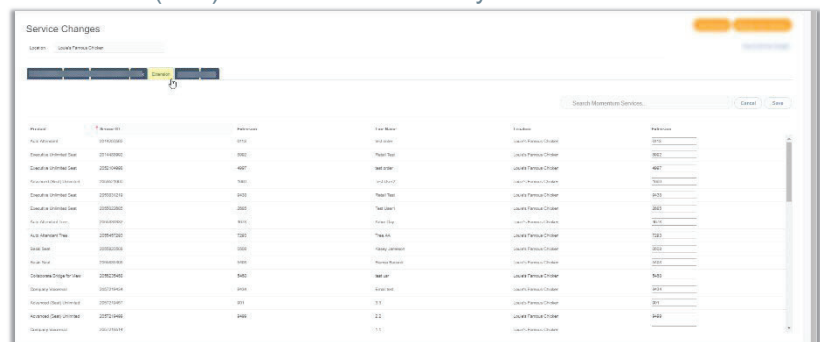
1. Click on the **Block** tab to display the section.
2. Select a **Location** at the top of the page to display the assigned lines.
3. Locate the line to be changed.
4. **Block:** Click within a checkbox to enable/disable the setting options, as needed. These settings include:
  - **Directory Assistance:**  Enable to block calls from the line to directory assistance (USA = 411).
  - **Operator Assistance:**  Enable to block calls from the line to operator assistance.
  - **International Calling:**  Enable to block international calls from the line.
  - **Domestic Long Distance:**  Enable to block domestic long distance calls from the line.
5. Click **Save** to submit the changes for processing or click **Cancel** and confirm when prompted to discard changes.



## Extension

Manage/change extension assignments for lines in each location on the account. In this tab, a section search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, and Location, and Extension (new). Column headers may be used to sort the list alphanumerically.

1. Click on the **Extension** tab.
2. Select a **Location** at the top of the page to view assigned lines in a simple table format.
3. Locate the item to be changed.
4. Type a new extension number in the **Extension** field adjacent to the item in the far right column.
5. Repeat as needed for other lines.
6. Click **Save** when finished to submit the change(s) to the extension(s) or click **Cancel** and confirm when prompted to discard changes to extensions.



## Listing

Make *changes* to the *Listing Type*, *Omit Address*, and *Listing Name* options for the ordered products for each location on the account. The data in this section is listed in an easy to use table format. The searchable details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, Location, Listing Type, Omit Address, and Listing Name.

The screenshot shows the 'Service Changes' interface for 'Louie's Famous Chicken'. At the top, there are tabs for 'Open Requests', 'Caller ID (CNAM)', 'Block', 'Extension', 'Line Type', and 'Listing'. The 'Listing' tab is selected. Below the tabs is a search bar labeled 'Search Momentum Services...' with 'Cancel' and 'Save' buttons. The main area contains a table with the following data:

Product	Service ID	Extension	Line Name	Location	Listing Type	Omit Address	Listing Name
Auto Attendant	201425552	8113	test order	Louie's Famous Chicken	NONPUB	<input type="checkbox"/>	John Doe
Executive Unlimited Seat	201448892	3992	Retail Test	Louie's Famous Chicken	NOSUBMIT	<input type="checkbox"/>	
Call Center DNIS Number	202839368	3998	Retail Test	Louie's Famous Chicken	NOSUBMIT	<input type="checkbox"/>	
Executive Unlimited Seat	208210488	4007	test order	Louie's Famous Chicken	NOSUBMIT	<input type="checkbox"/>	

1. Click on the **Listing** tab to open the section for review.
2. Select a **Location** at the top of the page. The list for the location displays.
3. Make changes to the following, as needed:
  - **Listing Type:** Choose from:

The screenshot shows a dropdown menu titled 'Listing Type' with the following options: NONPUB, LISTED, NONLIST, NONPUB, NOSUBMIT, and NOSUBMIT. A hand cursor is pointing to the second 'NONLIST' option.

- LISTED – Select to enter information and list.
- NONLIST – Select to enter information but not include in list.
- NONPUB – Select to Enter information but not include for publish.
- NOSUBMIT – *Default. Read-Only.* Select another Listing Type to make changes.

- **Omit Address:** Click to place a checkmark in the box to omit Address in the listing.
  - **Listing Name:** Type the name for the listing.
4. Repeat as needed to make changes to additional listings for the location.
  5. Click **Save** when finished to update the Listing(s) with the change(s). Or click **Cancel** and confirm to discard changes to Listing Types.

## Virtual Terminating Number

This Service Changes tab provides access for authorized Admins to make *changes* to the terminating number assignment for any Virtual Terminating Number lines that have already been added to the account. (Ref: [Add Services](#) and [Line Type](#)).

The screenshot shows the 'Service Changes' interface. At the top, there is a 'Location' dropdown menu set to 'Louie's Famous Chicken'. Below this is a navigation bar with tabs: 'Open Requests', 'Seat Type', 'Caller ID (CWAM)', 'Block', 'Extension', 'Line Type', 'Listing', and 'Virtual Terminating Number' (which is highlighted). A search bar labeled 'Search Momentum Services...' is positioned to the right of the tabs, with 'Cancel' and 'Save' buttons. Below the search bar is a table with the following data:

Product	Service ID	Line Name	Location	Terminating Number
Virtual Number	3048070517	8 8	Louie's Famous Chicken	2057219534
Virtual Number	2055080329	3 3	Louie's Famous Chicken	2057219538

1. Click on the **Virtual Terminating Number** tab in the *Service Changes* page.
2. Select a **Location** from the drop-down list at the top of the page. *The list for the location displays.*
3. Identify the correct virtual number line within the table.  
*The Search tool and column headers are available to assist in sorting or filtering the list.*
4. Click within the corresponding field under the **Terminating Number** column (far right).
5. Enter the new 10-digit telephone number (**no** spaces/special characters) to define a new number to which all calls will be directed.
6. Click on the **Save** button when finished to submit the changes and update the system with the new terminating number information.

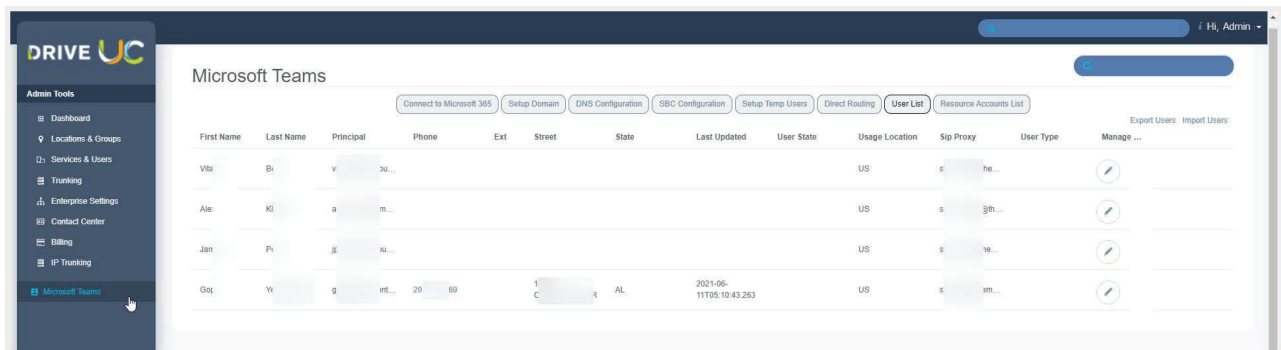
While the system updates the data for the VTN(s), the change request information may be reviewed in the **Open Requests** tab, and within the **View All Service Changes** page.

The **History** of this service change activity may be reviewed in both of those pages, as well.

## \*Microsoft Teams

*Restricted Access. Only organizations that have Microsoft Teams integrations may see this section and only an Authorized Microsoft Teams Administrator should ever attempt to use these management tools.*

The **Microsoft® Teams** section requires advanced permissions for MS Teams Admins. It offers access to administration tools for managing the basic user voice network TN assignments for MS Teams users. Post-deployment, Teams Admins with access to work in this area are auto-directed to the User List tab when *Microsoft Teams* is clicked in the left Navigation Menu panel. The User List area displays the licensed Teams users that have been loaded into the account from Microsoft Office 365 and offers access to the tools provided for managing Teams User TN assignments within this portal.



The tabs listed at the top of the Microsoft Teams section include:



- **Connect to Microsoft 365** - For Deployment tasks. Restricted/Limited access for Teams Admins
- **Setup Domains** - For Deployment tasks. Restricted/Limited access for Teams Admins
- **DNS Configuration** - For Deployment tasks. Restricted/Limited access for Teams Admins
- **SBC Configuration** - For Deployment tasks. Restricted/Limited access for Teams Admins
- **Setup Temp Users** - For Deployment tasks. Restricted/Limited access for Teams Admins
- **Direct Routing** - For Deployment tasks. Restricted/Limited access for Teams Admins
- **User List** - For Deployment tasks and TN management. Restricted/Limited access for Teams Admins. This area allows Teams Admins to review and manage current Teams user TN assignments and Direct Routing usage for integrations with the service provider's network.
- **Resource Accounts List** - This tab allows Teams Admins to perform simple BroadSoft voice TN management tasks for Teams Resource Accounts after the deployment is completed.

**Note:** Teams Admins can review useful deployment and setup information and manage settings limited to Teams User direct routing access or TN assignment changes within this section in the My Cloud Services Portal. Only a limited set of tasks may be completed in this portal. To complete management and maintenance tasks that cannot be performed in this application, Microsoft Teams Admins may access the full set of the assigned user and account administration tools for their MS Teams instance by logging into the appropriate **Microsoft Teams/Microsoft 365/O365 Administration Portal** directly.

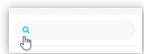
## User List

This Microsoft Teams tab section is the default post-deployment view for Authorized Teams Admins.

The **User List** provides tools to review basic Teams User information and **Edit** each Teams User's TN assignment or direct routing setting from this portal and offers **read-only** access to select additional Teams User information that is entered by the Teams Admin via the Microsoft 365/O365 Teams account portal.

First Name	Last Name	Principal Name	Phone	Street	State	Last Updated On	User State	Usage Location	Sip Proxy	User Type	Manage User	Import Users	Export Users
John	Doe	john.d@hemou...						US	sip.vbors@hem...				
John	Doe	john.d@hemou...						US	sip.alharui@he...				
John	Doe	john.d@hemou...						US	sip.perry@hemo...				
John	Doe	john.d@hemou...						US	sip.anunulsel...				
John	Doe	john.d@hemou...		880 Montclair RD	AL	2021-04-15T15:13:08.137		US	sip.gopi@hemou...				

### Section Search



Enter terms to locate data specific to the User List section.

### Columns

Column headers can be clicked to sort list contents alpha-numerically. The Phone column contents offer a shortcut link to each assigned User's Dashboard



The Edit icon for each listing opens the User's Edit dialog to manage the TN assignment or turn Direct Routing On/Off.

### Export Users

Click this link to export a formatted .csv file containing current data for the Teams Users added in the Microsoft portal. This file can be used to edit multiple Teams User TN assignments. Note: This file is also formatted to edit and then Import into this portal.

### Import Users

Click this link to import a correctly formatted .csv file containing specific User data from your local files into the portal to update Teams User TN assignments.

## Search Teams User List

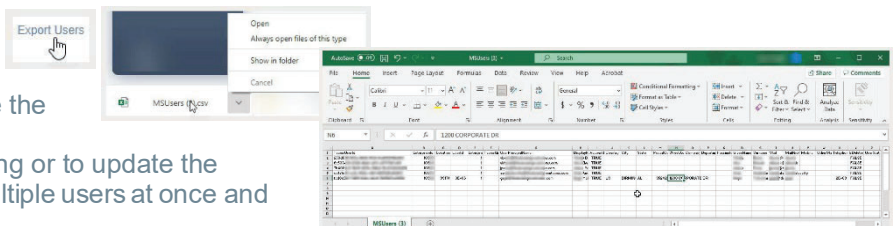
The section **Search** field at the top of this tab allows the Admin to enter terms to find within the User List. Matching listings display for review or selection. Remove the search term from the field to re-display the full default list view.

## Export List

The Export Users link creates a pre-formatted .csv spreadsheet file containing the current list of Teams Users that can be opened for review/edit and saved locally. This data is imported from Microsoft Teams. Only TN assignment and Direct Routing should be updated using this form.

1. Click the **Export Users** link (top right). The system will create a file for review and download locally.

2. Click on the **MSUser (x).csv** file that displays at the bottom of the browser to open or save the file locally.




This file is useful for reporting or to update the following information for multiple users at once and then import into the portal:  
*TN Assignment* and *Direct Routing ON/OFF* per user.

3. Use the browser or application tools to **Save** the copy to a local folder or system file.


## Import Users

Click the [Import](#) link at the top right of the User List view to upload a correctly formatted .csv file containing Teams User TN assignments into the portal. This is useful when there is a need to update the TN Assignment of multiple Teams Users. Otherwise, the Edit icon next to a User in the list offers access to complete this task for individual Teams Users quickly and easily. See also: [Export Teams User List](#)

## Manage Teams User -TN Assignment

Authorized Admins may have access to assign and edit Teams User TN assignments within Microsoft Teams > User List. Please note, that the majority of the information displayed to Admins in this section is read-only and offered as a reference. Fields that display a red circle with a slash icon  when the cursor is hovered are read-only.

While working in Microsoft Teams > User List:


1. Click on the  icon adjacent to the desired User within the list in the far-right Manage User column. The Update Microsoft Teams User dialog displays. In this view only the TN Search field at the top of the list allows the Admin to make changes, but the other fields are read-only.
2. Click within the TN Search field to use the dynamic search tool to locate unassigned TNs in your inventory that can be selected for this user. As you type a useful search entry, the list will filter to show any available TNs that contain matching information for review and selection.
3. Click on a TN within the search results to select it and assign it to the user. The system will automatically update this Teams User's settings to use this TN for VOIP calls or as a backup to Teams Calling.

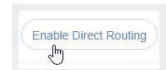
Upon completion, you may click on Microsoft Teams in the left Navigation Menu to return to the User List or select another area of the Cloud Services Portal to review.

## Manage Teams User - Direct Routing

Authorized Admins may have access to manage the Teams User Direct Routing setting within this portal. Please note, that the majority of the information displayed to Admins in this section is read-only and offered as a reference.

While working in Microsoft Teams > User List:

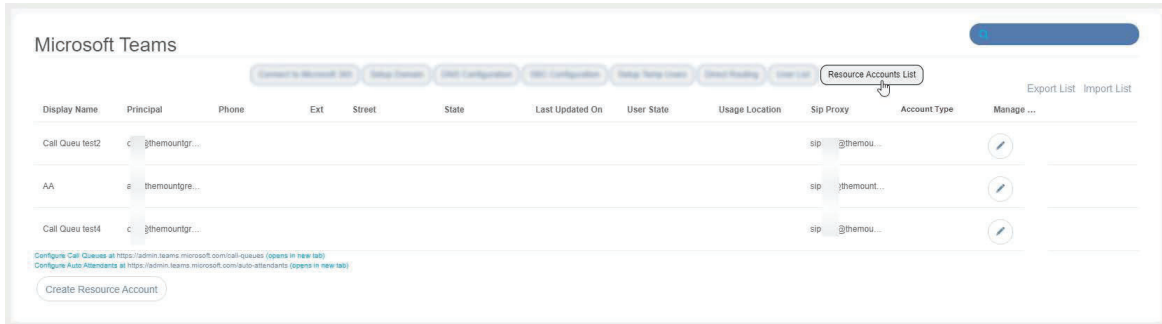
1. Click on the [Edit](#) icon  adjacent to the desired User within the list in the far-right *Manage User* column. The Update Microsoft Teams User dialog displays. In this view there is a button to Enable or Disable Direct Routing for the Teams User. If Disable is selected, the user's TN assignment is also removed.
2. Click on the Enable/Disable Direct Routing button (top right) This button is dynamic and shows the action that can be taken currently. For example, when Direct Routing has already been setup the button displays Disable Direct Routing.
  - **Enable:** Ensure a TN has been assigned and confirmed. Then Click Enable Direct Routing.
  - **Disable:** Click the Disable Direct Routing button. Use Caution: this action also removes the TN Assignment and cannot be undone. Once clicked, the system will display a confirmation dialog.
3. Click on the [Yes](#) button to continue and make the change, or click NO to stop and return to the list view. The system will update and display a message upon successful completion, or in the case of an error, will offer an error message. Contact your organization's MS Teams Admin for assistance. Upon completion, the user may exit this dialog and click on Microsoft Teams in the left Navigation Menu to return to the User List or select another area to review.



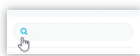
## Resource Accounts List

*This Microsoft Teams tab section is for Authorized Microsoft Teams Admins only.*

The **Resource Accounts List** provides tools to review basic Teams Resource Account information and TN assignment or direct routing setting from this portal and offers read-only access to some additional resource information that is entered by the Teams Admin via the Microsoft Teams/O365 account portal. Full management of Teams Resource Accounts should be performed within MS Teams/O365.



### Section Search



Enter terms to locate data specific to the section in view.

### Columns

The column headers can be clicked to sort list contents alphanumerically. The **Phone** column contents offer a shortcut link to each assignedUser's Dashboard.



The **Edit** icon for each listing opens the Resource Account's *Edit* dialog to manage the TN assignment or turn Direct Routing On/Off.

### Export List

Click this link to export a formatted .csv file containing current data for the Teams Resource Accounts in the Microsoft portal. This file can be used for reporting or to bulk edit multiple Teams Resource Account types. Note: This file is also formatted to edit and then Import into this portal.

### Import List

Click this link to import a correctly formatted .csv file containing formatted Resource Account data from your local files into the portal to update the information in the list.

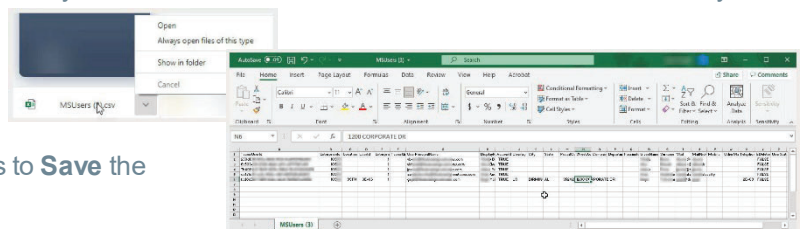
## Search Teams Resource Accounts List

The section **Search** field at the top of this tab allows the Admin to enter terms to find within the List. Matching listings display for review or selection. Remove the search term from the field to redisplay the full default list view.

## Export List

The **Export** link creates a pre-formatted .csv spreadsheet file containing the current list of Teams Resource Accounts that can be opened for review/edit and saved locally. This data is imported from Microsoft Teams. The file is formatted to allow minor edits to be made and *Imported* into this portal.

1. Click the Export List link (top right). The system will create a file for review and to download locally.
2. Click on the **.csv** file that displays at the bottom of the browser to open or save the file locally.
3. Use the browser or application tools to **Save** the copy to a local folder or system file. See also: Import List (below).



## Import List

Click the [Import](#) link at the top right of the User List view to upload a correctly formatted .csv file containing formatted Teams Resource Accounts information into the portal. This is useful when there is a need to update the list for multiple Teams Resource Accounts in bulk. Otherwise, the Create Resource Account button should be used to add, and the **Edit** icon next to a Resource Account in the list offers access to manage TN assignments or to enable/disable Direct Routing for individual auto attendants or call queues quickly and easily. See also: [Export List](#) (above)

## Configure Teams Call Queues

Configuration of Teams Call Queues is not performed in this portal. the Teams Admin must complete those tasks in the Teams/O365 Admin portal. A link directing the Teams Admin to the Teams administration portal to complete those tasks is provided.

## Configure Teams Auto Attendants

Configuration of Teams Auto Attendants is not performed in this portal. the Teams Admin must complete those tasks in the Teams/O365 Admin portal. A link directing the Teams Admin to the Teams administration portal to complete those tasks is provided.

## Create Resource Account


Authorized Teams Admins can create a Resource Account Type to add to the list from here, however all other configuration and setting tasks are completed in the MS Teams Admin portal.

1. Click on the [Create Resource Account List](#) button (below the list)
2. Enter or select the following:
  - Display Name: Type a unique name that will be easy to locate in lists.
  - User Name: Type the correct Teams username for this resource account and select the correct domain.
  - Resource Account Type: Choose Auto Attendant or Call Queue via the drop-down selection tool.
3. Click [Save](#) to submit the new data or click [Cancel](#) to exit without making changes.

**Note:** Configuration and full management of Teams Auto Attendants and Call Queues is not performed in this portal. Links directing the Teams Admin to the Teams administration portal are provided below the list.

## Edit Resource Account

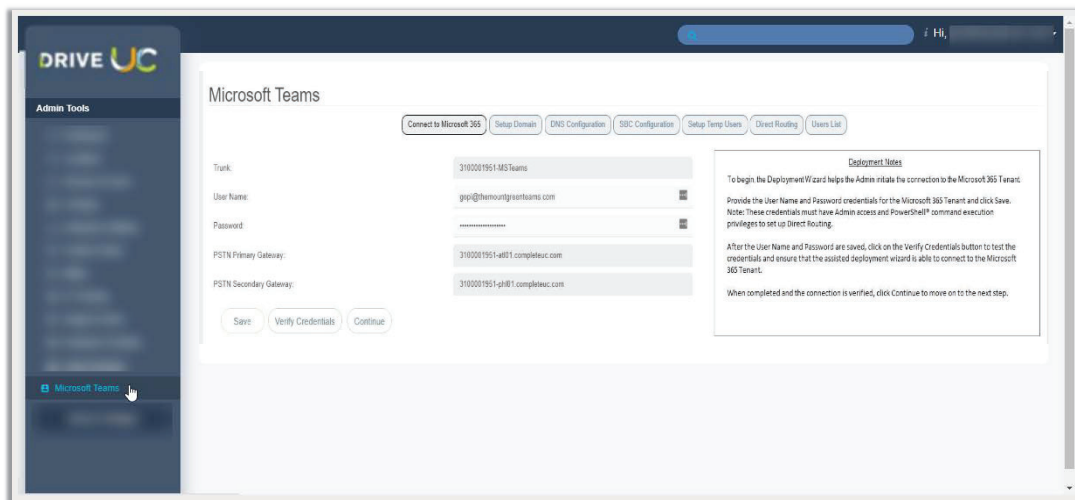
Each Teams Resource Account type listed in the table offers an Edit option (far right) to allow the Admin to update the TN assignment or setup/disable Direct Routing.

1. Click the [Edit](#) button  (far right) adjacent to a listing in the table to begin making changes to the TN Assignment or Direct Routing usage. *Note: All other fields in this dialog are read-only*
2. Make changes to the following, as needed:
  - TN Search - This field allows the Admin to enter text to view unused TNs currently in inventory. Once a TN is selected, the assignment is made.
  - Enable/Disable Direct Routing - Click this button (top right) to open a new dialog and either setup Direct Routing (as needed) and Save - or turn it OFF and Save. *Note: If Direct Routing is disabled, the TN assignment is also removed.*
  - User List - Click this button (top right) to go directly to the User List tab view.

## Teams Deployment Tabs

### Connect to Microsoft 365

The Connect to Microsoft 365 tab is the first step in the deployment wizard of the MS Teams instance and has restricted/read-only access. It allows an authorized Teams Admin to begin the setup and deployment process by entering and verifying the correct Administration and Username/Password access credentials for the organization's Microsoft 365 or MS Teams account. Most fields in this tab are pre-populated to contain the correct information and cannot be edited. The **Notes** section may display instructions for tasks performed during the initial deployment process.



**During Deployment:** The User Name and Password fields need to be completed with the Microsoft365/O365/Teams Tenant admin account access credentials, saved, and then verified to ensure the connection. All other fields are read-only and pre-populated to contain the correct information for setup.

Read-only fields display a red icon when the cursor is hovered over the field. 

**Post-Deployment:** The User Name and Password verification data may be reviewed, and the credentials may be updated (and verified) by an authorized Admin when necessary. All other fields are read-only.

### Add Microsoft Teams Account Admin Access Credentials

1. Enter Microsoft 360/O360 User Name and Password credentials
2. Click **Save**.
3. Click **Verify Credentials** - the system will verify and provide a notification of **success** or **failure**.  
*Check the account information in Microsoft Tenant and retry entry of username/password credentials as necessary until successfully connected to the Microsoft Teams tenant.*
4. If this is the initial deployment, click **Continue** to proceed to the next deployment step.

### Edit Microsoft Teams Account Admin Access Credentials


Authorized Administrators may have access to edit the account access credentials for the organization's Teams instance when they have been updated/changed in the Microsoft account.

1. Enter new Microsoft 360/O360 Tenant User Name and Password credentials with Direct Routing/scripting access permissions.
2. Click **Save**.
3. Click on **Verify Credentials** and wait for the success notification. *Check the credentials, re-enter as necessary, and try again if verification is unsuccessful.*

## Setup Domain

During the deployment process, it provides access for an authorized Teams Admin to Verify the domain information and complete the first step for enabling Direct Routing for the account. The Notes section offers brief instructions for tasks that can be performed.



The fields in this tab are pre-populated to contain the correct information and cannot be edited.  An authorized Teams Admin may click the [Verify Domain Information for Direct Routing](#) button to review results in a pop-up window and click [Continue](#) to move on to the next step in the deployment process.

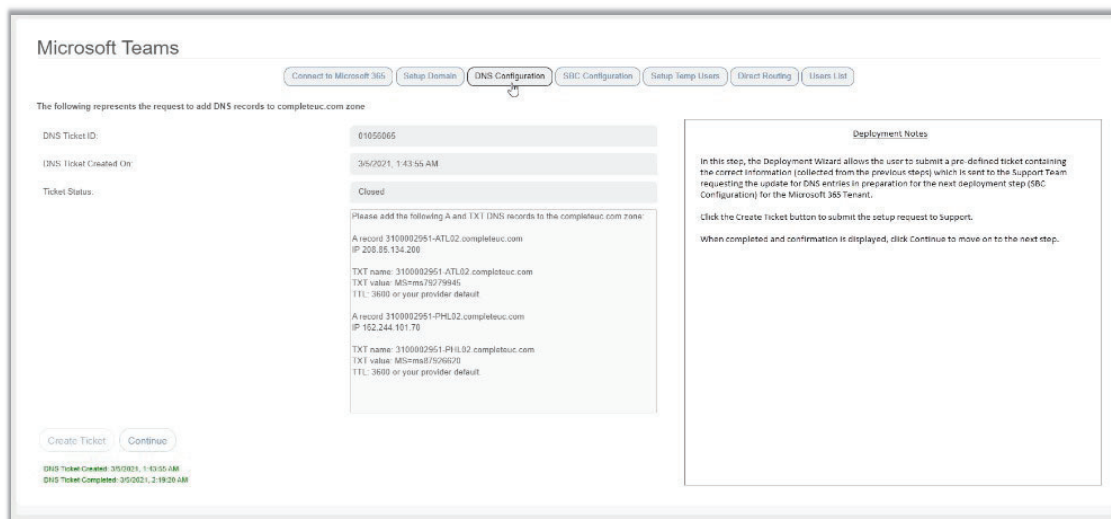
### View Domain Information for Direct Routing

Post-Deployment, an authorized Teams Admin may review the setup completion notification and click [View Domain Information for Direct Routing](#) to see the deployment data in this tab.

## DNS Configuration

*This Microsoft Teams tab section is for deployment and has restricted/read-only access for Teams Admins post-deployment.*

This deployment wizard tab provides access for an authorized Teams Admin to create and submit a support ticket requesting DNS domain creation for the account. The Notes section displays brief instructions for tasks that can be performed in this tab for deployment.



During deployment, the fields in this tab are auto-populated with the correct information and cannot be edited. 

An authorized Teams Admin may click the [Create Ticket](#) button during deployment to submit the pre-filled ticket to the correct department and review ticket number and subsequent completion notifications when that process is complete, and the ticket is closed.

[Continue](#) displays the next tab and deployment step: SBC Configuration.

**Post-Deployment:** Authorized Teams Admins may access this tab to review the setup completion notification data and the ticket closure date/time information for this step in the deployment process.

### Create DNS Configuration Ticket

An authorized Teams Admin may click the [Create Ticket](#) button during deployment to submit the prepared ticket to the correct department for DNS Configuration. Once submitted, the Teams Admin may review ticket number and subsequent completion notifications when that process is completed, and the ticket is closed.

Click [Continue](#) when configuration is complete to display the next deployment step.

## SBC Configuration

*This Microsoft Teams tab section is for deployment and has restricted/read-only access for Admins once implemented.*

During the deployment process, it provides access for an authorized Teams Admin to create and submit a support ticket requesting SBC/FQDN creation for the account. The **Notes** section offers brief instructions for the task that can be performed here.

The fields in this tab are auto-populated with the correct information and cannot be edited. An authorized Teams Admin may click the [Verify Domain Information for Direct Routing](#) button to review results in a pop-up window and click [Continue](#) to move on to the next step in the deployment process.

Post-deployment, authorized Teams Admins may review the setup completion notification data and the direct routing verification information in this tab.

## Setup Temp Users

*This Microsoft Teams tab section is for deployment and has restricted access for Teams Admins once implemented.*

During the deployment process, this tab provides access for an authorized Teams Admin to specify the correct License type and then create the temporary users for the account. The system will take at least 24 business hours to replicate and update completely before further deployment tasks can be performed. The Notes section displays instructions for the tasks that can be performed in this section for deployment.

The screenshot shows the 'Microsoft Teams' deployment wizard at the 'Setup Temp Users' step. The breadcrumb trail includes: Connect to Microsoft 365, Setup Domain, DNS Configuration, SBC Configuration, **Setup Temp Users**, Direct Routing, and Users List. Below the breadcrumb, a message states: 'The following will be added as temporary Microsoft Teams users'. There are two input fields for 'Temp User 1' and 'Temp User 2', both containing the email address 'tempuser1@3100001951-a801.completeuc.com'. A 'License Type' dropdown menu is set to '--Select--'. At the bottom left, there are 'Create Temporary Users' and 'Continue' buttons. A status bar at the bottom left indicates: 'WAIT 24 HOURS FOR REPLICATION ACROSS THE SYSTEM', '4/6/2021, 12:38:34 PM', and 'Temporary Users Created: 4/6/2021, 12:38:34 PM'. On the right, a 'Deployment Notes' box contains instructions: 'In this step, the Deployment Wizard allows the Admin to select the correct License Type and create temporary users (as shown in the Temp User 1 and 2 Fields) within Microsoft 365 to validate the domain configuration items completed in the previous steps and prepare for Direct Routing setup. Select the License Type from the drop-down list of options. Click on the Create Temporary Users button. Please wait for 24 business hours to allow Microsoft 365 to replicate the domains across their systems. When completed (and after 24 business hours have elapsed to provide time for propagation through the Microsoft system), click Continue to move on to the next step. Note: A Microsoft 365 Tenant Admin can remove these temporary test users in the Microsoft 365 portal after the direct routing setup is completed and it has been verified that it is working.'

During deployment, the two Temp User fields in this tab are auto-populated with the correct information and cannot be edited. The Teams Admin may complete the following tasks here:

- ❖ Select the correct License Type (Microsoft E1, E3 or E5) from the drop-down list.
- ❖ Click the **Create Temporary Users** button. This submits the information for creation. Upon completion, Authorized Teams Admins can review creation notifications.
- ❖ Checkback after 24 hours to view and click the **Continue** button to move on to the next step.

**Post-Deployment:** Teams Admins may review the setup completion notification data and view the task completion date/time information for this step in the deployment process.

## Direct Routing

*This Microsoft Teams tab section is for deployment and has restricted/read-only access for Admins.*

During the deployment process, it provides access for an authorized Teams Admin to Verify the domain information and complete the first step for enabling Direct Routing.

The **Deployment Notes** section offers brief instructions for the task that can be performed in this tab.

The screenshot shows the 'Microsoft Teams' deployment wizard at the 'Direct Routing' step. The breadcrumb trail includes: Connect to Microsoft 365, Setup Domain, DNS Configuration, SBC Configuration, Setup Temp Users, **Direct Routing**, and Users List. Below the breadcrumb, a message states: 'Direct Routing will be:'. There are three input fields: 'PSTN Primary Gateway' with '3100001951-a801.completeuc.com', 'PSTN Secondary Gateway' with '3100001951-ph01.completeuc.com', and 'Max Concurrent Sessions' with '1000'. At the bottom left, there are 'Setup Direct Routing' and 'Continue' buttons. A status bar at the bottom left indicates: 'WAIT 24 HOURS FOR REPLICATION ACROSS THE SYSTEM', 'Direct Routing Setup: 4/26/2021, 3:29:22 PM'. On the right, a 'Deployment Notes' box contains instructions: 'In this step, the Deployment Wizard helps the Admin enable direct routing of voice traffic between the Microsoft Teams Tenant and the Voice Network. The fields in this tab are predefined and read-only. Click on the Setup Direct Routing button. Once this step is complete, direct routing and TN assignments may be setup for the individual Teams users already added and assigned licenses in the Microsoft Teams Tenant.'

**During Deployment:** The fields in this tab are auto-populated with the correct information and cannot be edited.

An authorized Teams Admin may click the **Setup Direct Routing** button during Deployment to initiate the setup process. Note: this process takes approximately 24 business hours to complete and replicate across the system.

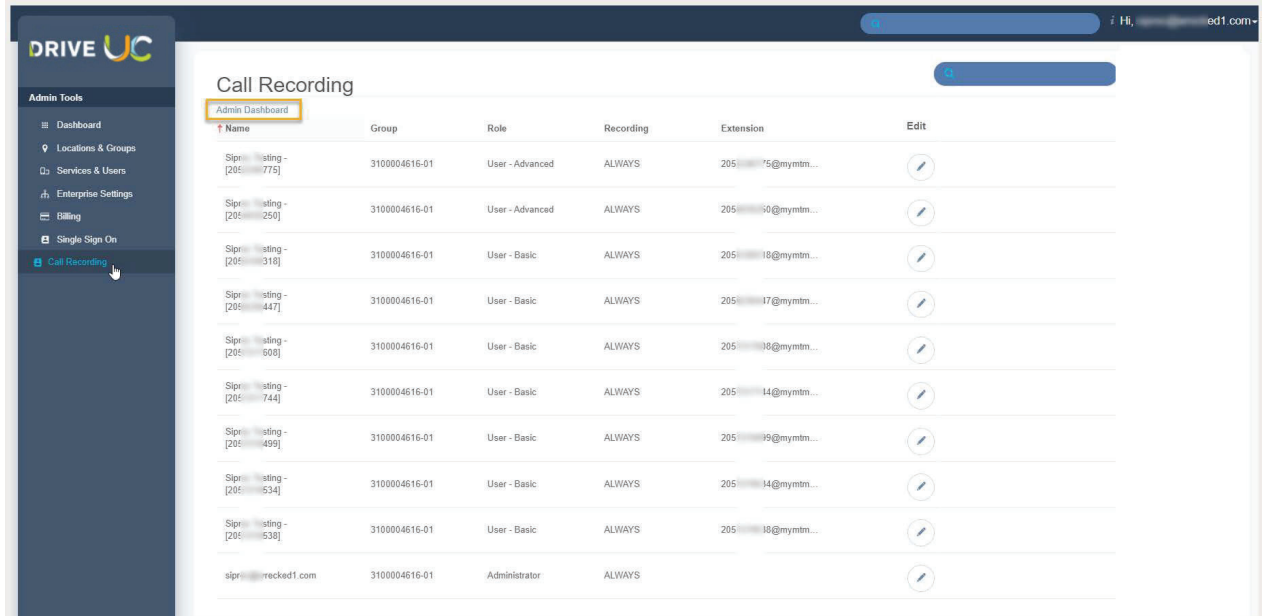
Once the setup process is finished, a notification of setup completion displays with a timestamp. At that point the Admin may click **Continue** to move on to the next step (User List) in the deployment process.

**Post-deployment:** Authorized Teams Admins may review the setup completion notification data and the direct routing verification information in this tab.

## \*Call Recording

Limited Access section for Call Recording Administration tasks. Authorization required.

The Call Recording section displays only if Call Recording licenses have been provisioned for users on the account and only to authorized Administrators. **See also:** [Set Call Recording Section Access for Users](#)




The display within the Call Recording page offers useful information about the users on the company's account that have been granted Call Recording licenses. This area offers tools to search the list of users in the display, view or manage the basic BroadSoft voice settings related to Call Recording for each licensed user, and a link at the top of the page for the Administrator (who is currently logged into the Cloud Services Portal) to access their Call Recording portal Admin account (if enabled) within a new web page.

### Search Call Recording Users

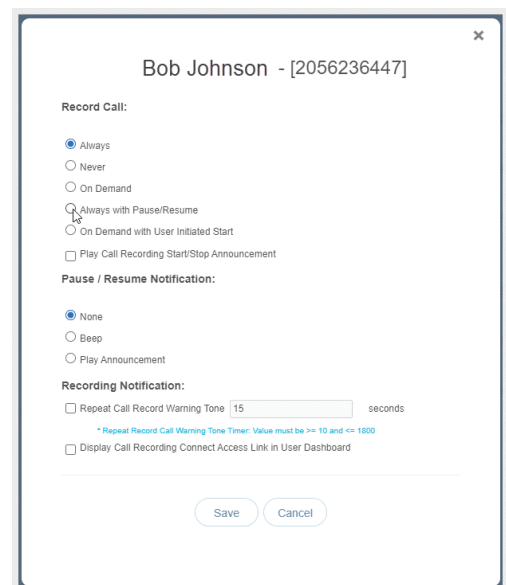
The Search bar within the Call Recording page offers a useful way to filter the page and find a user based on the data displayed within the table. Like the general site search bar, this field offers a dynamic search. As the Admin enters text into the page search field, the system locates all matches in the table below and displays them as a list for review. The Admin may click on a search result option to select it.

### Manage Call Recording-Related Voice Settings

While viewing the Call Recording page:

1. Locate the user in the list.
2. Click on the listing's Edit  icon (far right column).

The User Voice Settings dialog displays.



3. Select and/or enter information as needed in the following sections within the Voice Settings dialog:

**Record Call** - Click to select one of the following record options:

- Always - **Default**. Call recording is always on and saved and the user cannot pause or stop recording. This option is best for basic agent/users who should not have access to the Call Recording portal and do not need to control when or whether calls to or from their line are being recorded.
- Always with Pause/Resume - call recordings are always on, and the user can pause and resume as needed for privacy compliance. This option is good for basic agent/users who should not have access to the Call Recording portal and have need to occasionally pause the recording on their device to accept private information and then resume recording.
- On Demand - call recordings will be saved from the start of the call when the user manually starts the recording. This option is good for any licensed user (typically Advanced Supervisor/Admin) who should be able to control whether calls are being recorded on their extension.
- On Demand with user initiated start - call recordings are started by the user and the recording is saved only from the time the user initiates the recording during the call. This option is often assigned to advanced license users (Supervisors or Administrators) who should be able to control whether their calls are recorded and when the recording should begin.
- Never – If selected, the user's calls will not be recorded or saved at any time. This option is often assigned to users who may be C-level but are call recording license holders, Administrators, HR staff, or those in the organization who should not have their calls recorded at any time.
- Play Call Recording Start/Stop Announcement - Click to enable the use of an automated announcement when call recording is manually started or stopped by the user (when a Pause/Resume or On Demand record call setting is selected). *See the Play Announcement Notification setting below.*
- Record Voice Messaging - Optional - Click to enable recording of voicemails as well. Note: may be available for Executive Seats *only* if enabled for use by the organization during implementation.

#### Pause Resume Notification

Select one of the following options for notifications. The default setting is None.

- None – Default. No notification is played when Pause or Resume are applied for call recording
- Beep - A beep plays when Pause or Resume are used.
- Play Announcement – If enabled, a brief automated announcement plays at Pause/Resume.

#### Recording Notification

- Optional:  Repeat Call Record Warning Tone - Click to enable the use of a repeating warning tone during recorded calls and set the number of seconds between the tones. Min = 10 sec | Max = 1800 sec.
- Optional:  Display Call Recording Connect Access Link in User Dashboard. **Default = OFF**. Click to allow Call Recording portal Supervisors or Admins to view the Connect link to the Call Recording site in their Cloud Services Portal User dashboard. Note: *Call Recording License holders who are only being recorded and will not work in the 3<sup>rd</sup> party Call Recording Portal should not have this setting enabled.*

4. Click the **Save** button at the bottom of the dialog when finished to update the settings, or Cancel to exit.

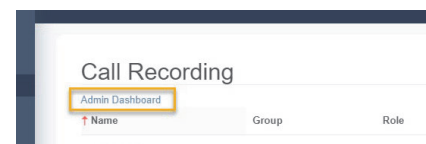
## Access the Call Recording Portal

Authorized Call Recording portal Admins logged into the Cloud Services portal as an Admin may have access to a link to the Call Recording portal from the **Call Recording** section in Admin Tools. Note: Some Cloud Services Portal Admins may *not* be Call Recording Admins and if so, this link will only allow the user to go to the 3rd party portal with the level of access they have (if any). If a single sign on protocol is in use and a user does not have sufficient access to enter the portal, the user is notified.

*While viewing the Call Recording section:*

1. Click on the **Admin Dashboard** link (top left).

This opens the Call Recording portal dashboard in a new window. *If Single Sign On (SSO) protocols are in use, the link opens the Admin's Call Recording account in a new browser window. Otherwise, the link may open to the Sign In page for the Call Recording portal to allow the Admin to enter their username and password credentials to log in.*





### Limited Access section for accounts with Webex application licenses.

The Webex section displays only if Webex licenses have been purchased for users on the account and should be viewed only by authorized Administrators. The Webex page provides a searchable list of the Webex users currently licensed on the account and their current activation process status.

Location	Service Type	Service ID	Ext	First Name	Last Name	Email	Webex Email Validation
AL - Birmingham	standard	Executive Unlimited Seat	20000055	Ja	Le		Pending Email Input
AL - Birmingham	standard	Executive Unlimited Seat	20000000	ME	Inc		Pending Email Input
AL - Birmingham	standard	Standard (Seat) Unlimited	20000011	Sa	Bo		Pending Email Input
AL - Birmingham	standard	Executive Unlimited Seat	20000041	Ma	Tel		Pending Email Input
AL - Birmingham	standard	Executive Unlimited Seat	20000027	Us	Ga		Pending Email Input
AL - Birmingham	standard	Executive Unlimited Seat	20000039	Or	I		Pending Email Input
AL - Birmingham	standard	Executive Unlimited Seat	20000061	Ka	Ma	kat.***@umt	Provisioned
AL - Birmingham	standard	Executive Unlimited Seat	20000072	Aj	Na		Pending Email Input
AL - Birmingham	standard	Executive Unlimited Seat	20000079	Co	Th	ct.***@umt	Provisioned
AL - Birmingham	basic	Executive Unlimited Seat	20000080	Ry	Teri		Pending Email Input

Admins may search for terms or names within the list using the Section Search tool (top right within the page), use the Column headers to sort the data below alphanumerically, and click the **Refresh Status** button next to a user in the table to check for the latest installation/provisioning process status updates.

- The drop-down selection tool at the top of the page also allows the Admin to filter the table content view by process status options, as needed. Filter options that may be selected include: All, Provisioned, Pending Email Input, Pending Email Validation, and Provisioning.
- Additional Filter fields above the sortable column headers allow the user to filter by Location, License Service Type, Service ID, Ext(ension), Name (first/last), and Webex Email Validation status.
- The **Export** link (top right) allows the Admin to download the listings in the current table view (filtered or Sorted) to a .csv spreadsheet file.
- A listing with an email entry in the Email column has begun or completed the activation process. When the status is **Provisioned**, the user has at least completed the process of email validation and can download, install, and sign into Webex.
- A listing without an email entry in the **Email** column, and/or who has a status of Pending Email Input, has not begun the activation process.