MY CLOUD SERVICES PORTAL

Administrator Guide

MOMENTUM

31623Q1-UC

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CONTENTS

WELCOME

Welcome to the Momentum Telecom family. We are thrilled to be working with you!

We also want to welcome you to the My Cloud Services Portal. The Momentum Team is constantly developing ways to improve your experience and offer new communications management tools that increase your productivity and make it easy to do what you do.

At Momentum, we understand the critical nature of communications services to businesses and to people, and we take our responsibility seriously. It is our mission to make certain that you have the ultimate in state-of-the-art communications, unparalleled network reliability, and a consistently superior customer experience to ensure that you and your company are able to *thrive*.

Thank you for letting us help you communicate!

Sincerely,

The Entire Momentum Telecom Team

INTRODUCTION

This guide is a convenient, go-to resource for Administrators getting started with the My Cloud Services Portal to manage communications accounts and services online. It provides an overview of the application website sections that may be available when a user with Administration level access logs into the Portal, and it offers instructions and tips for working with the tools in the portal for administration of communication features and services provided by Momentum Telecom.

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. The entire Momentum Team is committed to doing everything possible to deliver an exceptional experience, and we strive to improve every day.

Please note that this document describes all features and some of the features described here may not be included in your subscription, necessary for your system, or offered to all users by your organization.

Contact your Supervisor or your organization’s IT group to determine the features and services your organization has decided you will manage.

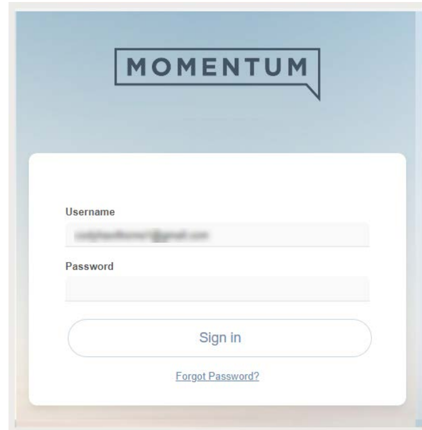
ACCESS THE PORTAL

Momentum Telecom offers an intuitive web Portal that makes it easy for Admins to customize and manage enterprise and subscriber account features and settings online. It is currently optimized for desktop usage, however the portal *is* accessible from any Internet-enabled device – desktop, laptop, tablet, or smartphone – so you can manage your services, whether you are in the office, at home, or on the go.

Sign In

To Access the My Cloud Services Portal:

1. Open a web browser and enter the URL (web address) provided for online account management.
   Example: portal.momentumtelecom.com.
   In most cases your initial Admin sign in credentials come from the Service Provider. If you need assistance for initial sign in (first time login), please contact your System Administrator or the Service Provider primary contact (Support, AM, or PM).



2. Enter the Admin Account Username (xxxxxxxxx@mymtm.us format) and correctly formatted Password credentials in the fields when they are provided/displayed.
   - Use the Forgot Password? link to securely update your password credential. Users with a defined notification email address on file can use this tool and will receive an email with a secure link to change the password. Contact your System Admin for assistance if notified that the process cannot complete or if the system identifies that your account does not have a notification email address on file.

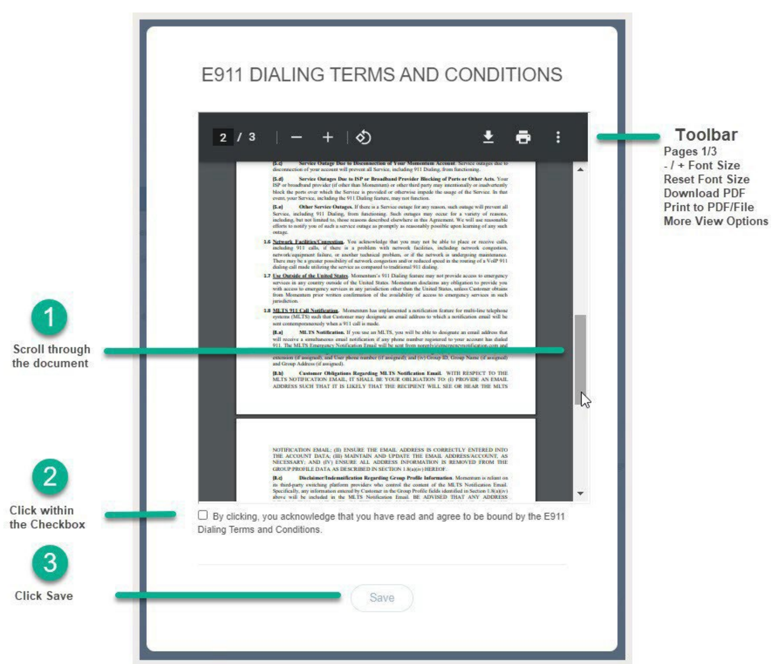
     Note: For your security, the link provided in the *Forgot Password* email is only active for 60 minutes - once that time limit expires, you must use the 'Forgot Password?' feature again to generate a new email with an active link to proceed, or contact your organization's Subscriber Portal Admin for assistance.
3. Click the Sign In button and the My Cloud Services Portal opens.

Terms and Conditions

The first time an Admin accesses the portal, an **E911 Dialing Terms and Conditions** acknowledgment dialog displays that must be completed to proceed.

1. Use the tools to review or save the document, as desired.
2. Click to place a check in the acknowledgment check box.
3. Click the Save button to submit and close the dialog.

Note: *Once submitted, this dialog will not be presented at login again unless these Terms and Conditions are updated.*



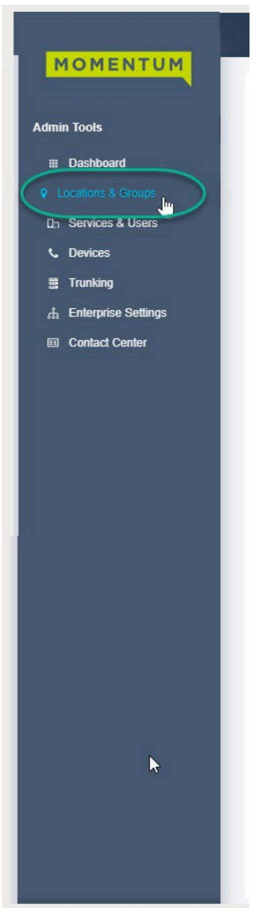
Once you sign into the My Cloud Services Portal the first time and acknowledge the terms and conditions, you will have access to the tools and features you need to easily manage your communications features - right at your fingertips.

ADMIN TOOLS

The My Cloud Services Portal provides useful resources to help with all 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 online.

When Administrators log into the portal, they see the Admin Tools section of the Menu Navigation Panel which provides authorized users with access to manage the related settings and services, as well as locate and manage individual accounts within the organization. This menu displays only those areas the Admin is permitted to view and access to work with features and tools in these sections may require additional permissions. The Admin Tools are user specific. The Navigation Menu Panel can include the following optional sections:

NOTE: Your system, purchased products, role and/or authorization level determine the sections and features you may be allowed to access, review, and manage.



- Dashboard - The home page for Administrators
- Locations & Groups - Location and Group level feature management
- Services & Users - User Account list and access to individual user settings
- Trunking - Review and manage SIP Trunk settings
- Enterprise Settings - Manage enterprise-level services and features
- *Contact Center - Limited Access. Administer Contact Center setup
- *IP Trunking - **Restricted Access**. Advanced specialized Trunk Group management
- *Enterprise Trunking - **Restricted Access**. Specialized Enterprise Trunk Group configuration management for specially trained/authorized Admins
- *Microsoft Teams - **Limit Access to Teams Admins.** Advanced Teams initial deployment and User TN / Routing assignment management tools
- *Call Recording - Call Recording customers only. Access permissions required. Manage basic voice settings for Call Recording licenses and define access to the Call Recording portal
- *Webex - Webex customers only. Search for and review the self-activation process status for users who are assigned Webex licenses
- *Billing - Restricted Access. Advanced Billing information review and payment management tools
- *Devices - Provider-Level Access. Advanced access to manage device inventory on the account. Requires additional training prior to access
- *Service Changes - Provider-Level Access. Advanced billing-impacting service change order management tools. Requires additional training prior to access

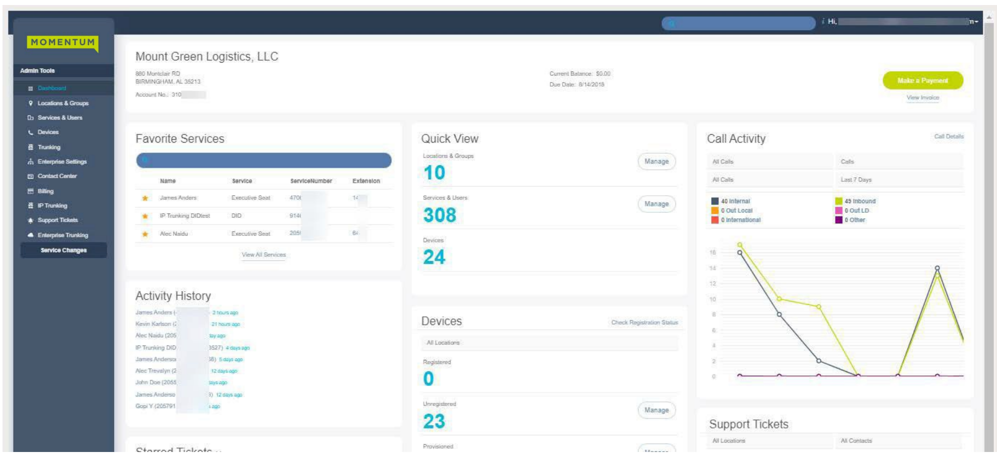
Restricted sections and their tools should only be used by specially trained and authorized Administrators with sufficient access permissions.

Each menu option opens the main page to begin working with the related settings or services where included on the account. Only the features and services the organization or service provider authorizes the Admin to view will be available for review within the portal. Advanced features should not be authorized for Admin use until well after the system is fully implemented and the Admin is well versed in the use of all basic tools. Additional training is required for advanced/restricted access tools.

For your security, the system's connection to the portal will begin a countdown to automatically close and return to the Sign In page if it is idle for more than 10 minutes, and will also require the admin to confirm they are still actively working at 60 minutes.

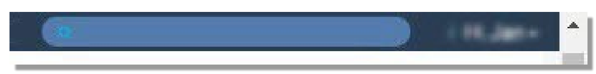
DASHBOARD

This page is the Home page for Admins. The Dashboard provides at-a-glance information about the activity of the accounts and services the Admin may view, site-wide search functionality, and access to all work areas the Admin needs within the portal. *Note: The tools and sections you see may differ from this example.*



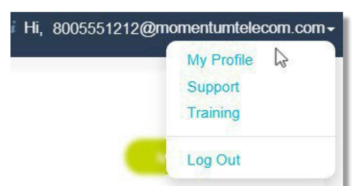
Site Search

The Search field at the top of the application offers site-wide search functionality within the areas the Admin may access.



Admin Information

The Hi, <User Name> area at the top of the application opens a drop-down list of quick access links to view your current user profile dashboard, go to the Support or Training pages, and to Log Out.

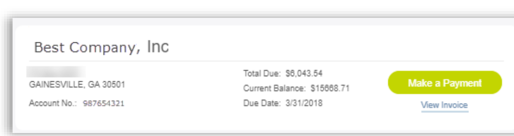


Admin Dashboard Sections

Each section and widget (card) featured within the Admin Dashboard provides useful information, tools, and filtered access links to the relevant work areas. Unfiltered access to those areas is offered in the Admin Tools Navigation Menu Panel.

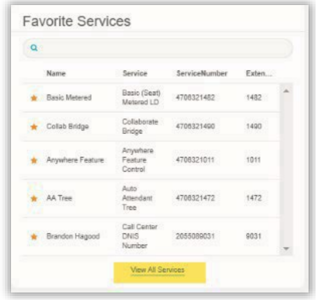
Billing Profile

This card at the top of the Dashboard offers account information, and for authorized Billing Admins - the current balance, the latest invoice information, and a direct access link to the Billing page to make apayment.



Favorite Services

This card allows the Admin to create a list of favorite ★ accounts or services to keep on the dashboard for quick access, a search tool, and a link to the Services & Users page to review the entire list of individual user / service accounts.



Quick View

Up-to-date information about the account, including the number of Locations & Groups, Services & Users, and NEPS registered Devices in inventory, with filtered links to the pages where those items can be managed.

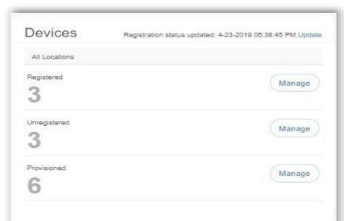
Call Activity

This section provides a quick graphical view of call data, with filtering tools to select specific call data for review by location, call type, date range, etc. This dashboard section offers useful 'mouse-over' details of the statistics within the dashboard and a Call Details link to review filterable call log data, plus the ability to Export Call Logs to a .csv spreadsheet format for reporting.

Note: To reduce the number of very large database searches that would slow response times in the portal when viewing Call Details logs, if the call log list grows to over 10,000 records returned, the system will display a message that the Export Call Logs tool should be used to allow for off line review of such a large request for data.

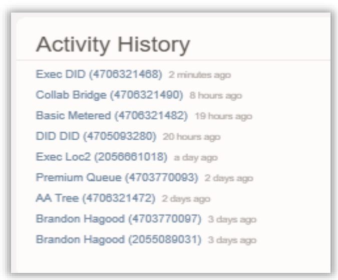
Devices

The Devices card displays the current counts for the NEPS and BroadSoft registered and/or provisioned devices that are in the account's inventory within the portal. Access is provided to filter the information per Location, check registration status information, and review the *Registered*, *Unregistered,* or *Provisioned* devices assigned to the selected Locations & Groups.



Activity History

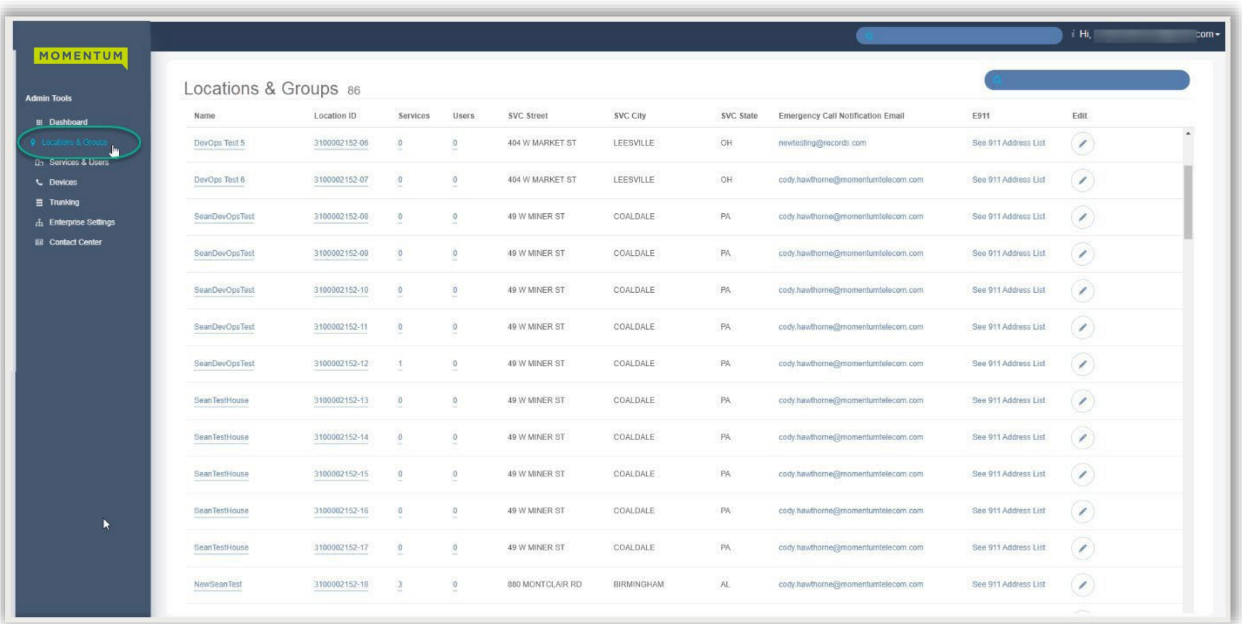
This section shows the most recent Administrator-level activity on the system for user or service accounts (that the admin may access) and, when an account displayed in the list is clicked, provides direct access links to open and review the selected User Dashboard.



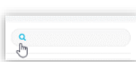
Note: *Additional dashboard sections may display information for optional or advanced permissions sections if any of those are authorized for use.*

Locations & Groups

The Locations & Groups page provides a searchable list of the Locations or Groups currently configured on the account to which the Admin has access. Authorized Admins may search for termswithin the list using the Section Search tool above the list, use the column headers to sort the data alphanumerically, manage e911 Address and Notification data, and Edit features used by each location or group.



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

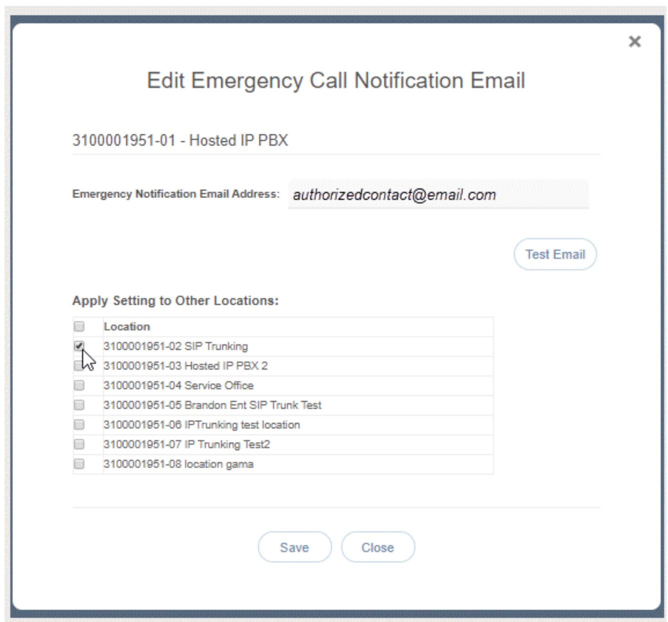
Note: Permission to edit this information at the location/group level is managed at the *Enterprise* level. See also: Enterprise Settings - Emergency Call Notification Email.

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 if 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.



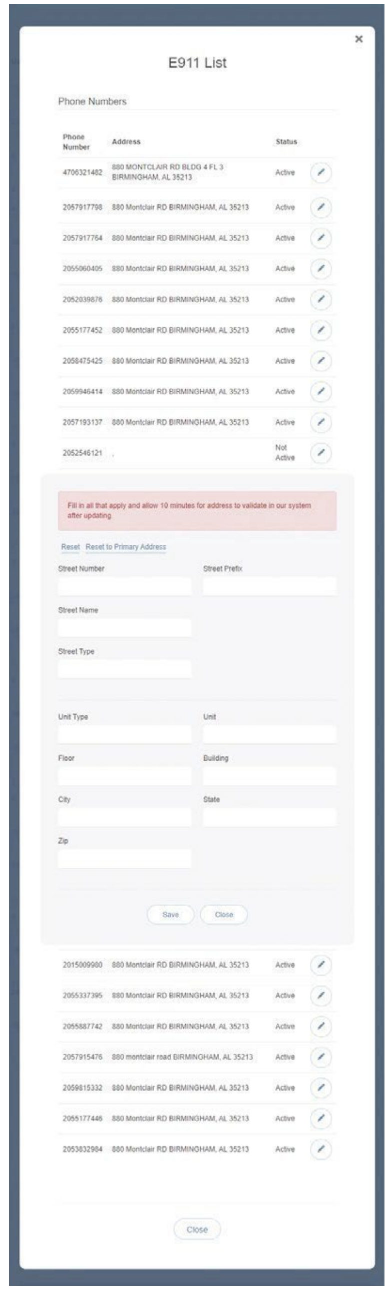
Note: Synchronization is usually quick, but it can take up to 15 minutes to fully update all necessary areas within the service provider system with the new email address information defined here when it is saved.

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 detailedand complete description of the location (full street address along with building, floor, etc.) is provided foreach 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. This e911 address information may be edited/managed at the Location level or User level.

Ref: FCC.gov - Kari's Law/Ray Baum's Act

While viewing the Locations & Groups Page:

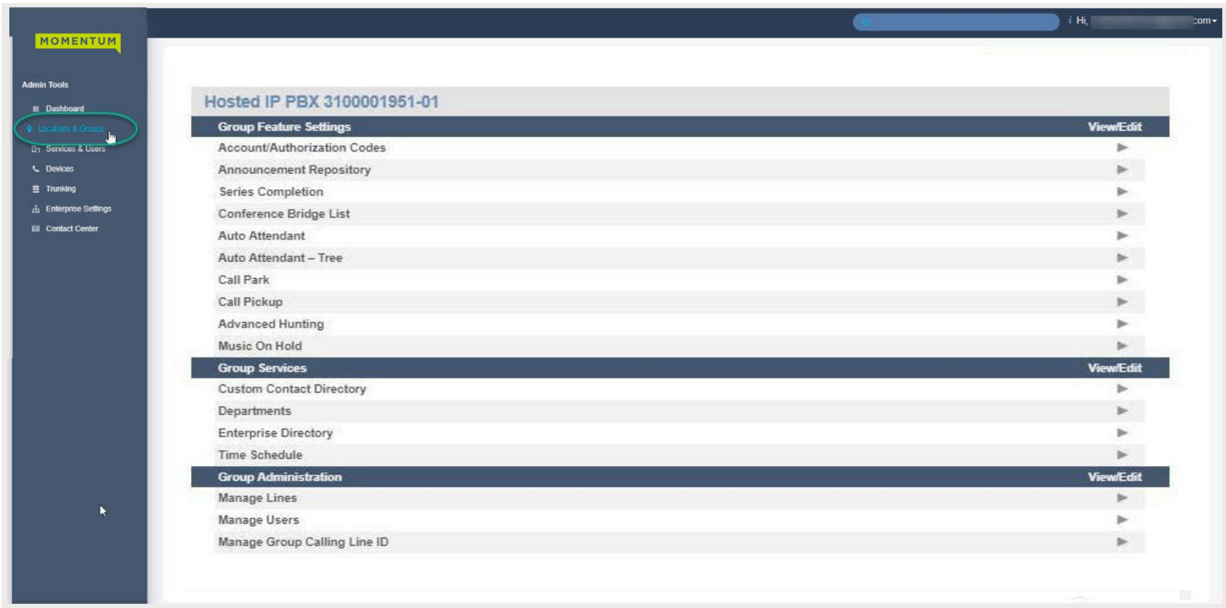
1. Click on the See 911 Address List link adjacent to a Location listing.
2. Click on the Edit icon adjacent to a desired listing to make changes.
3. Perform one or more of the following actions:
   - Reset: Click this link to clear the fields and enter correct information below.
   - Reset to Primary 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, 3rd office on the right, or similar information necessary to adequately identify the location of the calling party for first responders and speed up response time during emergencies.
4. 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. **Note:** An email will also be sent to the email address on file for CPNI change notifications (generally the account's Super Admin) at this time.*
5. Click Close when finished or click outside the dialog to exit the e911 List and return focus to the Locations & Groups list.

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.



Admins may be granted access to work with multiple feature settings in Locations & Groups.

At least some of the following features may be available for management:

Account / Authorization Codes

Manage setup and usage of Account and Authorization Codes. *Only one type of code may be used at a time per Location*.

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

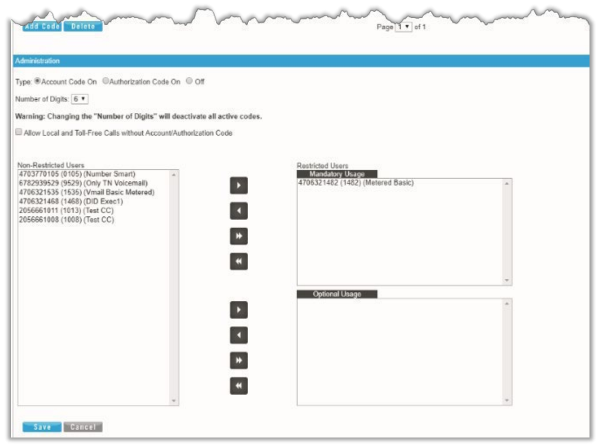
Add an Account or Authorization Code

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.



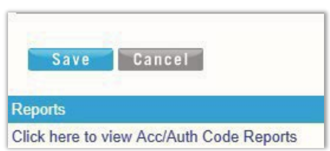
Edit an Account / Authorization Code

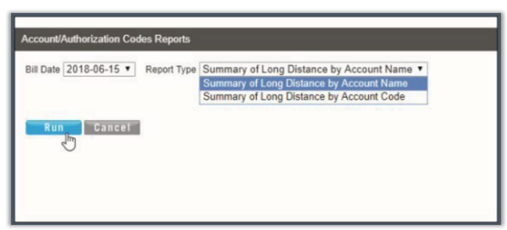
A. Enable/Disable: Click within the check box ☑ next to a code to enable or disable the code and click Save within the Code list section to update the system.

B. Modify: 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 and update the system.

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.

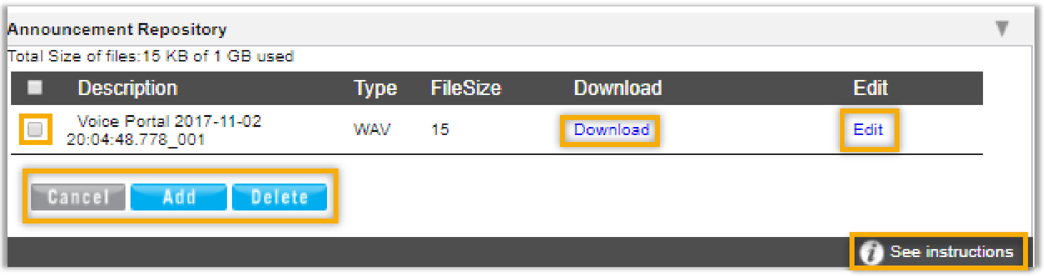




Announcement Repository

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 greetingsand announcement messages.

While in the Settings page, click on 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.

Basic Instructions and file size requirements are provided via the See instructions *link in the Edit view.*

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.
2. Change the Name or,
3. Click the Choose File button to navigate to and select a new file to upload/replace the announcement.
4. 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 and cannot be undone.

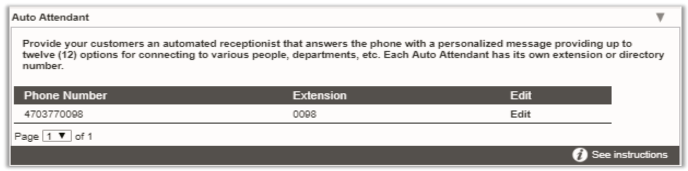
Auto Attendant

Manage the basic settings for the automated receptionist line(s) that answer the phone with a personalized message. Each Auto Attendant offers up to twelve (12) options for connecting to various people, departments, etc., and will be assigned its own extension or directory number.

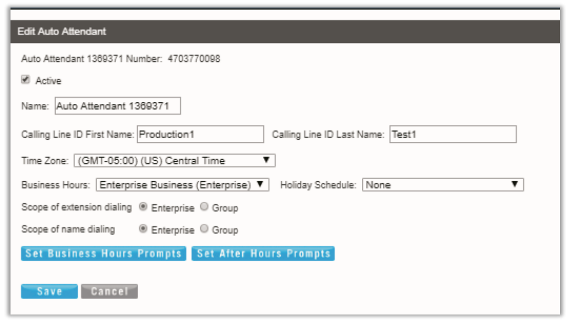
While in the Settings page, click the adjacent ► arrow under View/Edit to open the Edit view.

Edit Auto Attendant Basic 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*:



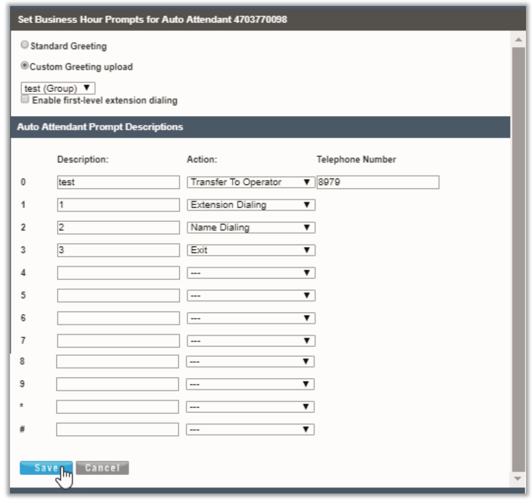
   - Active: Click within the check box to set to ☑ Active or to ☐ disable the Auto Attendant.
   - Name: Type a name that displays in lists for selection.



   - 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
3. Click Save to submit the changes and return the Auto Attendant list.

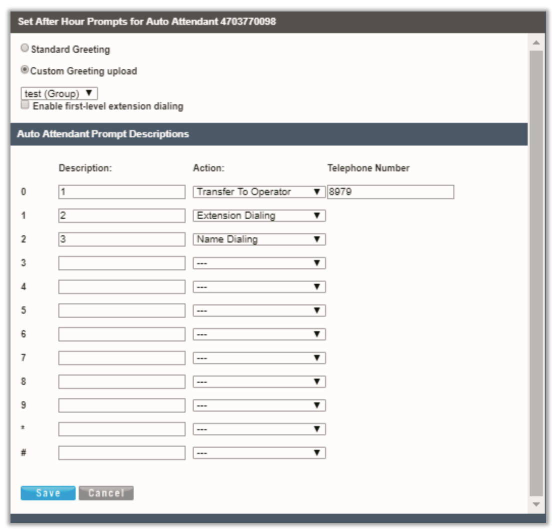
Edit Auto Attendant Business Hours Prompts

1. Click on the Edit link next to the desired Auto Attendant listing to review the current settings.
2. Click on the Set Business 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 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.



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 check box 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 next Save button presented to update the system with the new Auto Attendant settings and return to the *Auto Attendant* list.

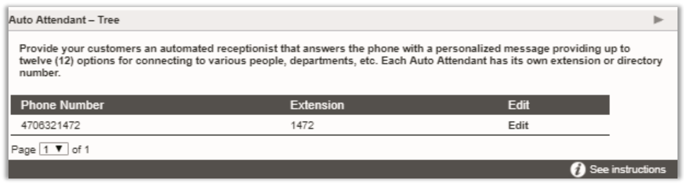


Auto Attendant – Tree

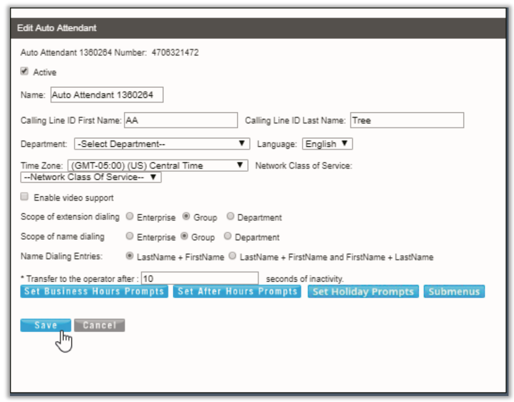
Manage the advanced settings for Auto Attendant lines and create one or more sub menus to handle additional lines, multiple calling schedules, individual departments, etc.
While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

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 check box 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



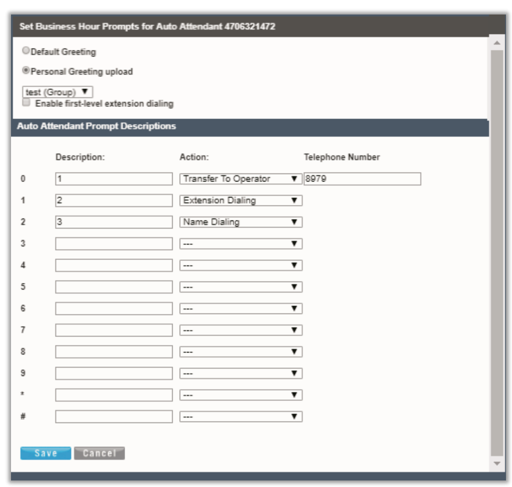
   - Department: Choose an option from the drop-down menu.
   - Language: English is the default in the menu.



   - 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 check box 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 (in seconds).
3. Click Save to submit the changes and return the Auto Attendant list.

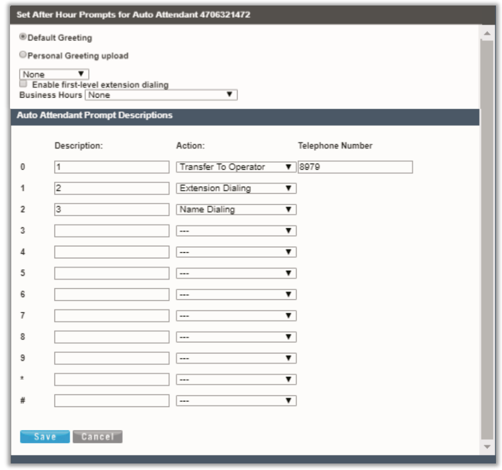
Set Auto Attendant Tree Business Hours Prompts

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 check box 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.



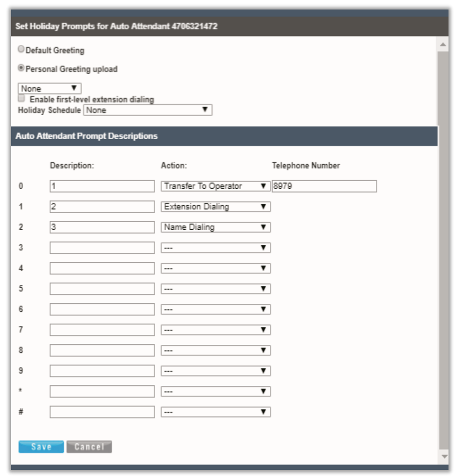
Set Auto Attendant Tree After Hours Prompts

1. Click on the Edit link next to the Auto Attendant - Tree 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 check box 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.



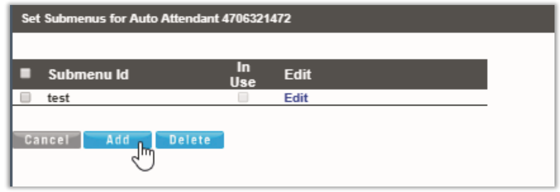
Set Auto Attendant Tree Holiday Prompts

1. Click on the Edit link next to the Auto Attendant – Tree 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 into the [Announcement Repository](#)).
4. Click to place a check next to ☑ Enable first-level extension dialing, to allow callers to dial an extension or a phone number.
5. Holiday Schedule: Optional. A Personal Greeting upload required. Choose the schedule from the drop-down options. Note: *The Personal Greeting upload will be overridden by the Start Announcements defined in each holiday schedule event as they trigger.*
6. Enter up to 12 Auto Attendant Prompt Descriptions, Actions, and where *Play Announcement* is the selected Action, choose an announcement, 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 and return to the Auto Attendant list.



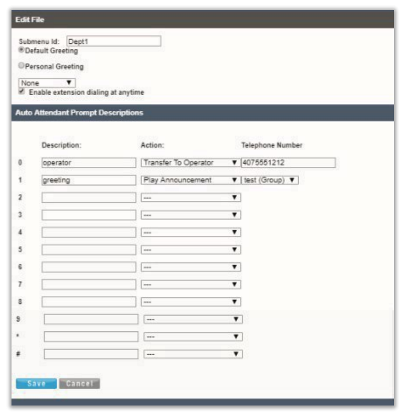
Add Auto Attendant Tree Submenus

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 check box 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

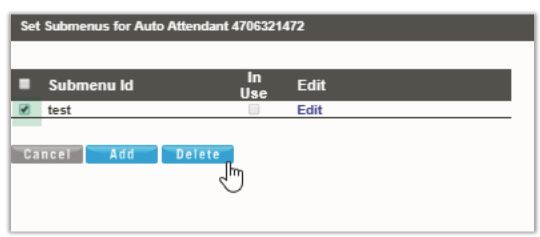


1. Click on the Edit link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the **Submenus** button to open the *Set Submenus for…* dialog. Click on the Edit link next to the Submenu.
3. Modify the settings or prompts, as needed.
4. Click the Save button to submit the Submenu changes and return to the Auto Attendant Tree setting view.
5. Click the Save button in the Settings view to update the system with the new setup and close the dialog.

Delete Auto Attendant Tree Submenus

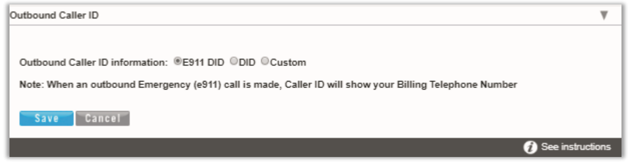
Caution: This action is immediate and cannot be undone.

1. Click on the Edit link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the **Submenus** button to open the *Set Submenus for…* dialog.
3. Click within the check box ☑ 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.

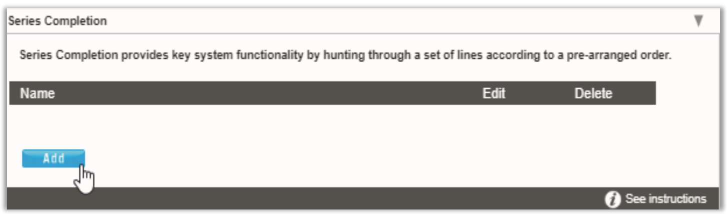


Manage Outbound Caller ID

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 on the account is displayed.

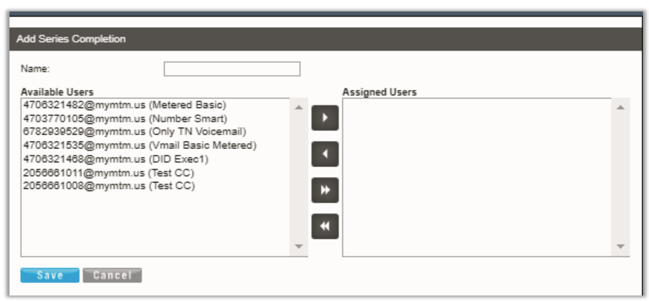
Series Completion

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.



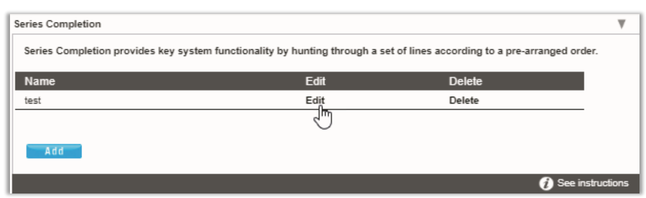
Add Series Completion

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.

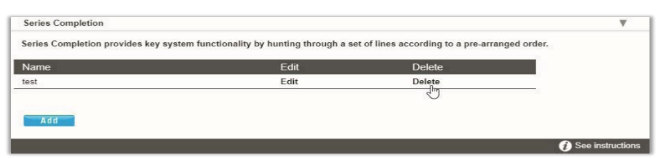


Delete Series Completion

Caution: This action cannot be undone.

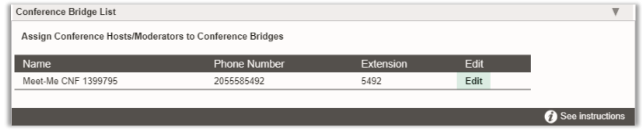
1. Click on the Delete option adjacent to the item you wish to remove from the system.

   The selected item is immediately removed.



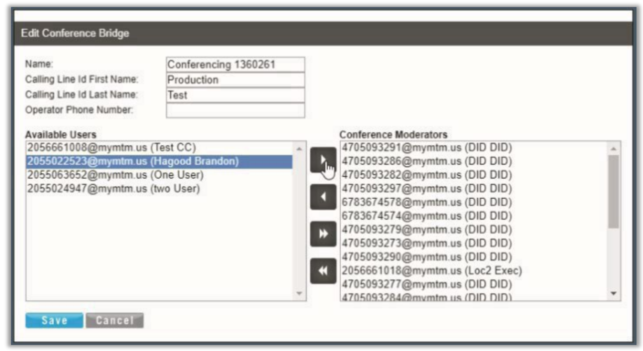
Conference Bridge List

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.



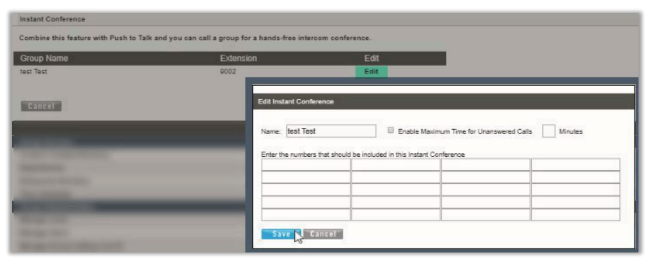
Instant Conference

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.

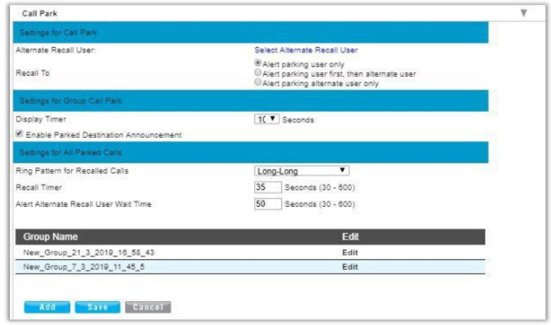
Manage Instant Conference

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 check box 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 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

1. Select or Enter the following:

   Settings for Call Park:

   - Alternate User Recall To: ⦿ Choose a user type

   Settings for Group Call Park:

   - Set Display Timer (in seconds).
   - Click to ☐ Disable/☑ Enable Parked Destination Announcement.

   Settings for All Parked Calls:

   - 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).

2. Click the Save button to submit the default settings and close the dialog.

Add a Call Park Group

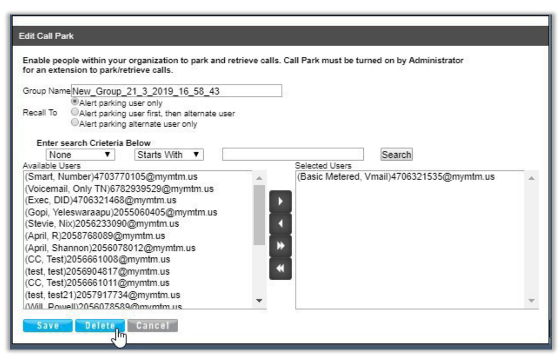
1. Click the Add button.
2. Accept the default or enter a Group Name.
3. Choose the group's Recall To: ⦿ user type.
4. Use the ⏵⏴ arrows to move highlighted Assigned Users to/from Selected Users.
5. Click the Save button to submit the information and close the dialog.

Edit a Call Park Group

1. Modify the Call Park (Group) Default Settings.
2. Click the Save button to update the call park group default settings.

Optional: Click the Edit option next to a Group in the list.

1. Modify the Group Name, Recall To, or User assignments.
2. Click the Save button to submit the changes.



Delete a Call Park Group

Caution: This action is immediate.

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.

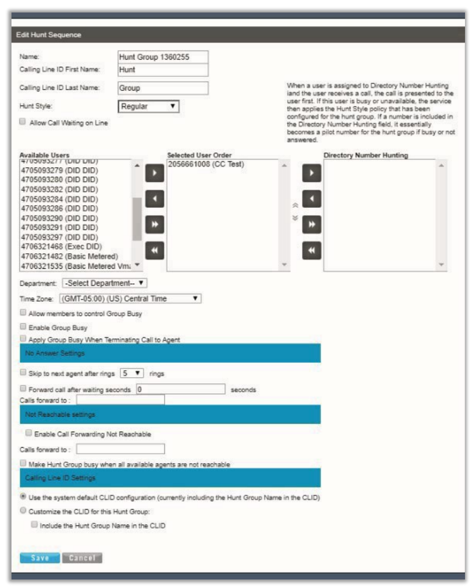
Manage Call Pickup Groups

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
2. Use Caution: This action is immediate and cannot be undone.
   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 in the Hunt Group.



Manage Advanced Hunting Settings

1. Click on the Edit option next to the Hunt Group listing.
2. 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 menu 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.

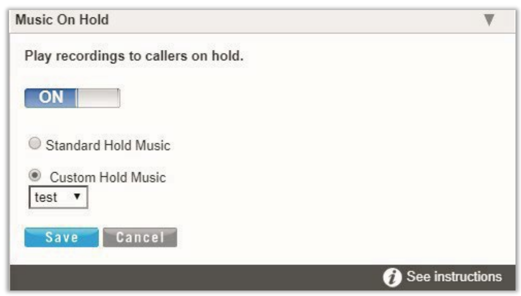
     Note: When a user is assigned to Directory Number Hunting and the user receives a call, the call is presented to the user first. If this Directory Number user is busy or unavailable, the service then applies the Hunt Style policy that has been configured for the Hunt Group. If a number is included in the Directory Number Hunting field, it essentially becomes a pilot number for the Hunt Group if busy /unanswered.
   - 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 select the amount of 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 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.

3. 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. File size requirements are provided via the link. While in the Settings, click the adjacent ▶ arrow under View/Edit to open the *Edit* view.



Manage Music On Hold

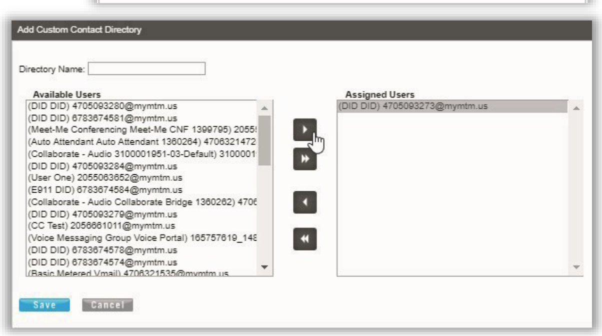
1. Click to turn ON or Off
2. Select ⦿ Standard Hold Music or ⦿ Custom Hold Music.
3. *Optional*: Choose a pre-uploaded 'custom file' from the drop-down menu. (See: Announcement Repository)
4. Click the Save button to submit the change and close the dialog.

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

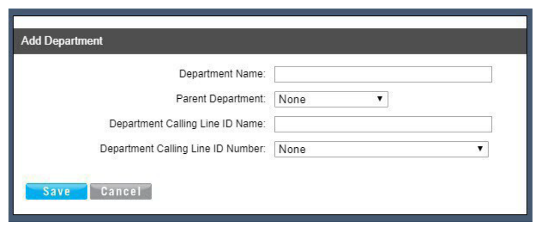
1. Click the Edit option next to a Contact List.
2. Click the Delete button to immediately remove the list from the system and close the dialog.

Departments

Manage Departments for the *Group/Location*.

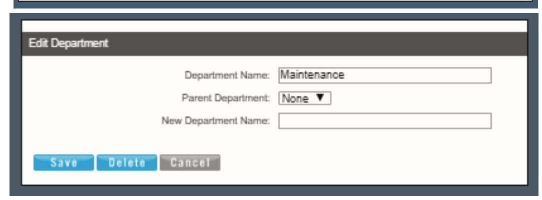
Add a Department

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 the 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 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.


Enterprise Directory

Enterprise Directory Summary Enterprise Directory Details

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 1360264 (Auto Attendant)	4706321472	1472				3100001951-01
Auto Attendant 1369371 (Auto Attendant)	4703770098	0098				3100001951-01
BroadWorks Anywhere 1360257 (BroadWorks Anywhere)	4706321011	1011				3100001951-01
Collaborate Bridge 1360262 (Collaborate - Audio)	4706321490	1490				3100001951-01
Conferencing 1360261 (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

Print Enterprise Directory Summary

1. Click on the Enterprise Directory Summary Link to view and even Print the abbreviated Phone List using your browser features.

Print Enterprise Directory Details

1. Click on the Enterprise Directory Details link to view a detailed Phone List that is ready to print using your browser features.

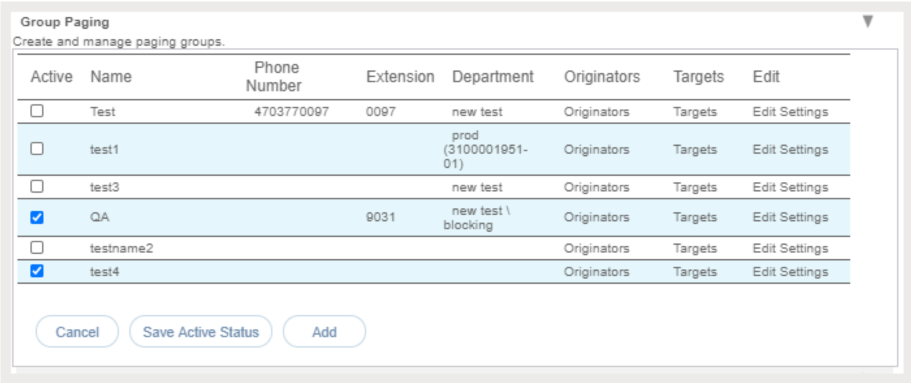
Group Paging

My Cloud Services Portal Administrators may have access to create and manage the use of paging groups within the Locations & Groups section if this service is in use on the system. These are groups of people within a department that can either send or receive a page to their phone. The Group Paging service allows a user to set up a one-way call to a group of up to 75 target users by dialing a number or extension. When used, the Group Paging service makes a simultaneous call to the phones of all the assigned targets and announces to the originator of the page that the system is ready for them to speak to those targets. When finished, the originator ends the page by hanging up the call. Group Paging basics include the following:

- A user can be assigned as both a paging target and paging originator in a paging group.
- A site can have multiple Group Paging services configured since users can be defined as a paging originator and/or a paging target in multiple paging groups.
- If a user is not on the phone, the call from a group page is automatically answered and the target hears a “Paging” announcement to alert them they are receiving a page.
- If a target is on a call, the page is not automatically answered. If a target chooses not to answer the page, the group paging call will not forward to the target’s voice mail.
- If a target has Do Not Disturb enabled on their phone, they are not called by the Group Paging service.
- Redirection of a Group Paging call is disabled. If a target has Call Forwarding services enabled, the Group Paging call will not forward to the configured Call Forwarding destination.
- If a target has Office Anywhere or Simultaneous Ring enabled, the configured destination service will not be called by the Group Paging service.
- When the page is set up to the targets, the originator receives a “Paging System Ready” announcement alerting them to begin speaking.
- The group page is a one-way audio service. The paging originator has a one-way talk path to the paging targets. The paging targets do not have a talk path to each other or to the paging originator for the duration of the page.

Access Group Paging

1. Sign into My Cloud Services portal.
2. Go to Locations & Groups and click the **Edit** link adjacent to the desired Location/Group to open the Settings page
3. Scroll down to Group Paging and click the adjacent ▶ arrow under the View/Edit column (far right).



Group Paging

Create and manage paging groups.

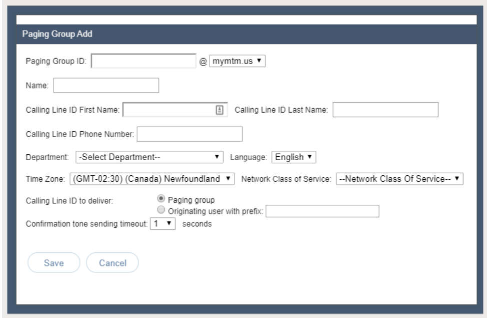
Active	Name	Phone Number	Extension	Department	Originators	Targets	Edit
☐	Test	4703770097	0097	new test	Originators	Targets	Edit Settings
☐	test1			prod (3100001951-01)	Originators	Targets	Edit Settings
☐	test3			new test	Originators	Targets	Edit Settings
☑	QA		9031	new test \ blocking	Originators	Targets	Edit Settings
☐	testname2				Originators	Targets	Edit Settings
☑	test4				Originators	Targets	Edit Settings

Cancel | Save Active Status | Add

Add a Paging Group

While in the Group Paging setting view:

1. Click the Add button to open the Paging Group Add dialog.
2. Enter and/or select the following settings and options:



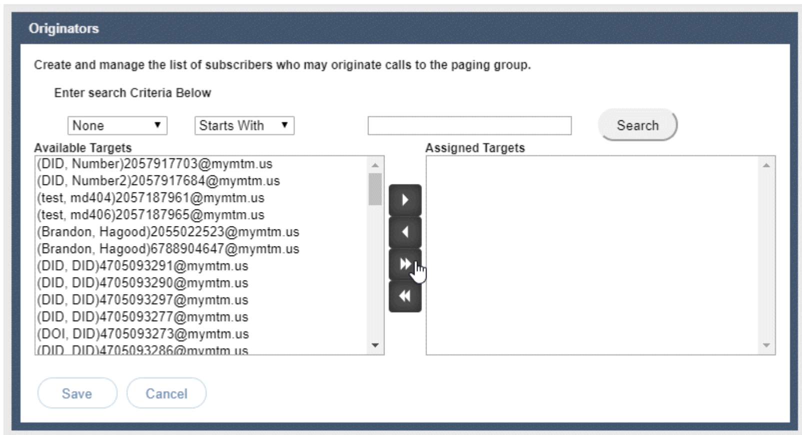
- Paging Group ID_@mymtm.us.
- Name - Type the name displayed in lists.
- Calling Line First / Last Name: Enter the first and last name used for Caller ID when paging.
- Calling Line Phone Number: Enter the 10 digit phone number or extension number to be used for a page.
- Department: Select the department to which the members of the Paging Group belong.
- Language: English is the default.
- Time Zone: Choose the correct time zone for the paging group.
- Network Class of Service: This setting is read-only.
- Calling Line ID to deliver: Choose whether the Caller ID for the pages to this group will show either the ⦿ Paging Group (ID) or the Caller ID of the ⦿ Originating user with prefix and enter the prefix in the field.
- Confirmation tone sending timeout (seconds): Select an amount for the confirmation tone timeout in seconds from the drop-down menu.

3. Click the Save button to submit the new Paging Group settings and close the dialog.
   Note: *Additional settings for the group must be defined in order to begin using Group Paging.*

Manage Paging Group Originators

Manage the users in the department/group who may send group pages out to the rest of the members.
While viewing Paging Groups setting list:

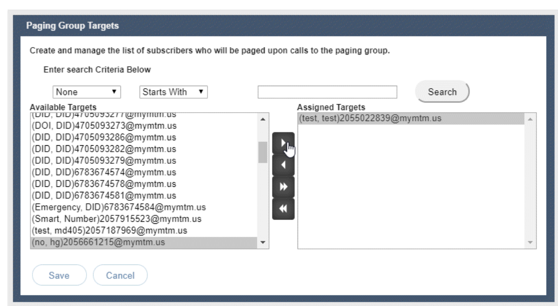
1. Click on the Originators link adjacent to the desired Paging Group in the table list,
   OR - Click the Edit Settings link adjacent to the desired Paging Group to open the *Modify* dialog and click on the **Originators** button.
2. Choose users from the *Available* pick list and use the ◂ ▸ arrows to move to/from the *Selected* list. Search tools are offered to narrow selection options.
3. Click the Save button to submit the information and close the dialog.



Manage Paging Group Targets

Manage the users in the department/group who will receive Group Pages.
While working in the Group Paging settings view:

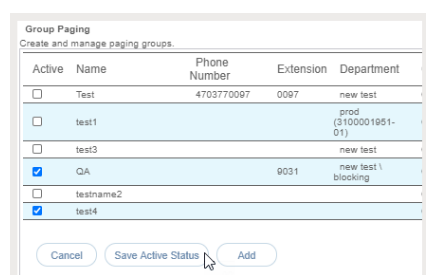
1. Click on the Originators link adjacent to the desired Paging Group in the table list,
2. OR - Click the Edit Settings link adjacent to the desired Paging Group to open the Modify dialog and click on the **Targets** button.
3. Choose one or more users in the *Available* pick list and use the ◂ ▸ arrows to move the selections to the *Selected* pick list. Search tools are offered to narrow selection options.
4. Click the Save button to submit the information and close the dialog.



Activate a Paging Group

While working in the Paging Group settings view:

1. Click to place a check mark in the Active box (far left) adjacent to the desired Paging Group in the list to set it to Active. Click again to remove the check mark and turn it OFF.
2. Click the Save button at the bottom of the dialog to submit the information.



Edit a Paging Group

1. Click the Edit link adjacent to the desired Paging Group.
2. Make changes to the available setting options.
3. Make changes to the **Originators** or **Targets** and click Save within that dialog.
4. Click the Save button in the Modify dialog to submit the new information and return to the list.
5. Click the Save button in the list view to ensure that the system is updated with all new group paging information and exit.

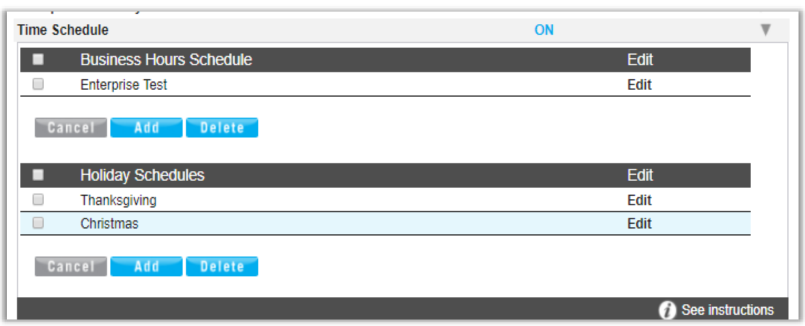
Delete a Paging Group

1. Click the Edit link adjacent to the desired Paging Group.
2. Click the Delete button at the bottom of the Modify dialog.
3. Click **OK** when prompted to confirm the action, close the dialog, and update the list.
4. Click the Save button in the list view to update the system and exit.

   Note: If a paging group number has been added as a Target under another Paging Group, the system will not allow it to be deleted until that assignment it removed. In this case, an error message containing information about the Paging Group to which it was assigned is provided. Once that Target assignment has been removed, the system will then allow the Paging Group to be deleted.

Time Schedule

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



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.

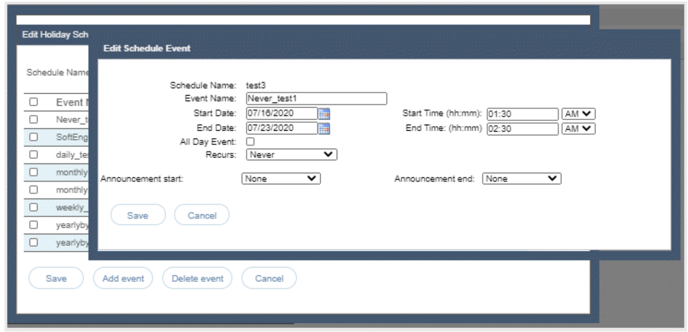
Delete a Schedule

Caution: This action is immediate and cannot be undone.

1. Click within the check box ☑ adjacent to a Schedule to select it.
2. Click on the Delete button within that section to immediately remove the Schedule and any events that have been defined within it.

Add an Event

1. Click Edit next to the preferred schedule option in either ☑ Business Hours or ☑ Holiday Schedule.
2. 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/End Date: Select the day the event begins and ends.
  1 day event = Jan 3 - Jan 3
  2 day event = Jan 3 - Jan 4
- Select the All Day Event check box ☑, or Start Time, End Time.
  Time = HH:MM
- Optional: Recurs – (Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week)
- 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, announcements, or recurrences.
3. Click Save when finished to submit the changes and close the dialog.

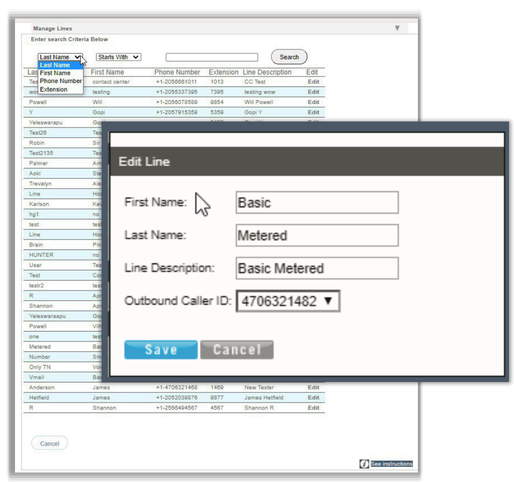
Delete an Event

Caution: This action is immediate and cannot be undone.

1. Click within the check box ☑ 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 check box ☑ 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 Schedules and close the dialog.

Manage Lines

Manage the names and numbers associated with lines on the account. While in the Locations > Settings page, click the adjacent ► arrow under View/Edit.



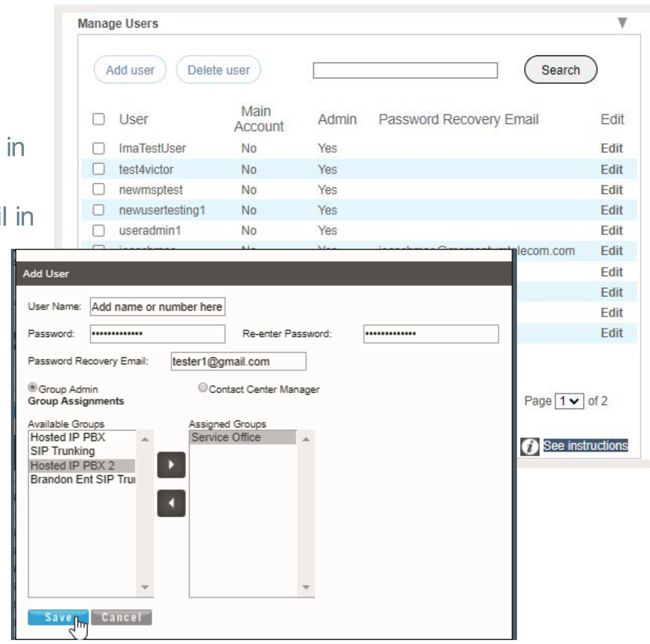
You may use the Search tools at the top to locate a listing by the data displayed within the *Last Name*, *First Name*, *Phone Number*, or *Extension* columns.
Click a column header to sort in ascending/descending alphanumeric order. The Close button exits the view.

1. Click the Edit link next to a number to modify the listing.
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 *Edit Line* dialog.

Manage Users

Manage user access rights and extension assignments. Tools are provided to **Search** the list and view additional pages. Note: Some of these changes (e.g., password changes) will trigger a notification email to the organization's Administrator and/or the notification email on file for the organization per FCC CPNI change rules. While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

Manage User Password and Recovery Email



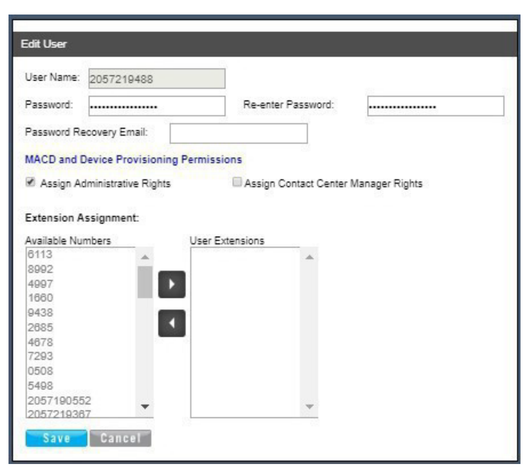
1. Locate the user you wish to modify within the list.
2. Click the Edit option next to the selected user.
3. Enter the following, as needed:
   - Password: Type the new Password and again in *Re-enter Password* to confirm.
   - Password Recovery Email: Type the full email in name@email.com format. This is where the system will send the recovery information and notifications when changes are made. Another email will automatically be sent to the Super Admin (or email on file for CPNI Changes) as a notification of the CPNI change to a password.
4. Click the Save button to submit the change.

Add Users to Groups

1. Click the Add User button.
2. 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.
3. Click the Save button to submit the change and close the dialog.

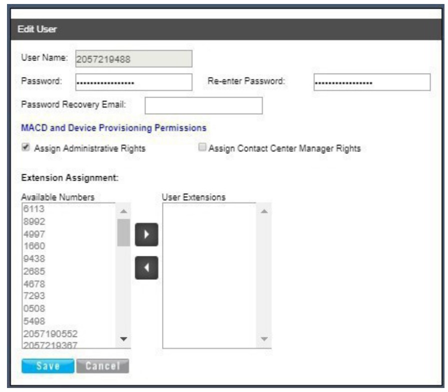
Edit User Access and Extension

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 box.
4. Click the Save button to submit the changes and exit.



Assign Administrative Rights to a User

⚠ Create a **NEW** user account that will be granted Admin access rather than *editing* a User account.



1. Create a new user and save.
2. Locate that new user in the list and click the Edit option next to the selected user.
3. Click within the ☑ Assign Administrative Rights to enable.
4. Click the Save button to submit the changes and close the dialog.

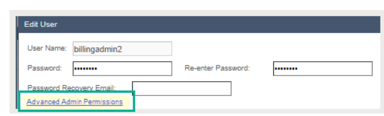
Assign Contact Center Manager Rights to a User

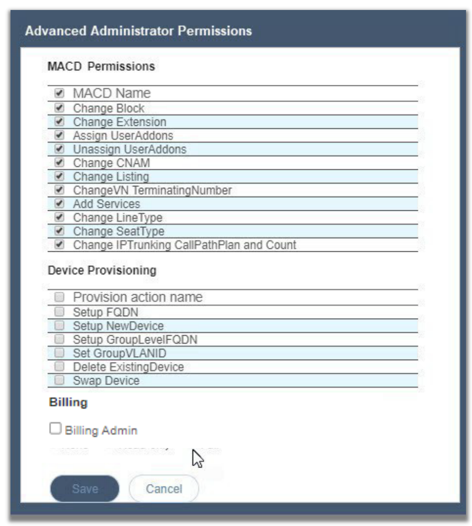
1. Locate the user account you wish to modify within the list.
2. Click the Edit option next to the selected user.
3. Click within the ☑ Assign Contact Center Manager Rights to enable.
4. Click the Save button to submit the changes and close the dialog.

Set Advanced Administrator Permissions

CAUTION. Additional Administrator permissions are required for access to review and manage the information and tools within the provider-level restricted access sections. By default, those restricted area features are ***not*** enabled for use by *any organization's* Admin and the permissions must be enabled and setup by the Provider *after* specialized Admin training has been completed. *The organization's Super Admin must work with their Account Manager at the Service Provider to discuss the organization's responsibilities and liabilities for usage prior to these features being enabled and management of access by the organization's Super Admin to be allowed. See Advanced Permission Sections.*

While working in Manage Users:





1. Locate a User in the list with the Admin column set to Yes.
2. Click on the Edit option next to the selected user.
3. Click on the Advanced Admin Permissions link to review and edit the *Advanced Admin Permission* settings.
4. Service Changes Permissions - (MACD) RESTRICTED ACCESS. Click within the listed check boxes to ☑ enable or ☐ disable appropriate Service Changes section and feature access. Note: *Use Caution. Optimally, only the SuperAdmin should be provided with access to the tools in any enabled restricted access section. Do not attempt to grant access beyond what the Service Provider defined initially.*
5. Devices (Provisioning) – (RESTRICTED ACCESS) Click within the listed check boxes to ☑ enable or ☐ disable appropriate administrative device management access in the *Devices* section.
6. Billing – (RESTRICTED ACCESS)
   Note: *This option only displays in systems that have Location level Billing enabled for use by the provider and the selected Admin has permissions as a Location/Group level Admin.*
   Click within the listed check box to ☑ enable or ☐ disable this Admin as a location level billing admin with the ability to review and manage bill payments for specifically assigned locations.
7. Click the Save button to submit the changes, close the dialog, and return to the *Edit User* view.
   The restricted access section(s) will display to that Admin upon their next login in the Left Nav Menu options and related Dashboard widgets (if any) will also display.

Delete Users

Caution: This action is immediate and cannot be undone.

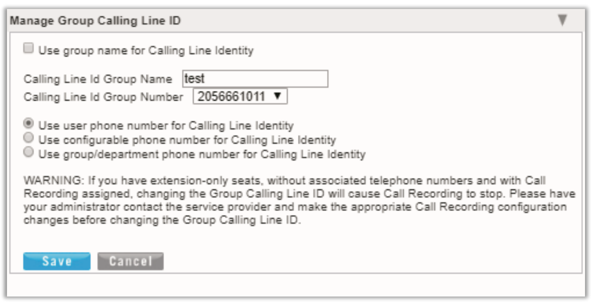
While working in Manage Users:

1. Click within the check box ☑ adjacent to a User in the list to select that individual.
2. Click the Delete User button to instantly remove the user from the list.

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.

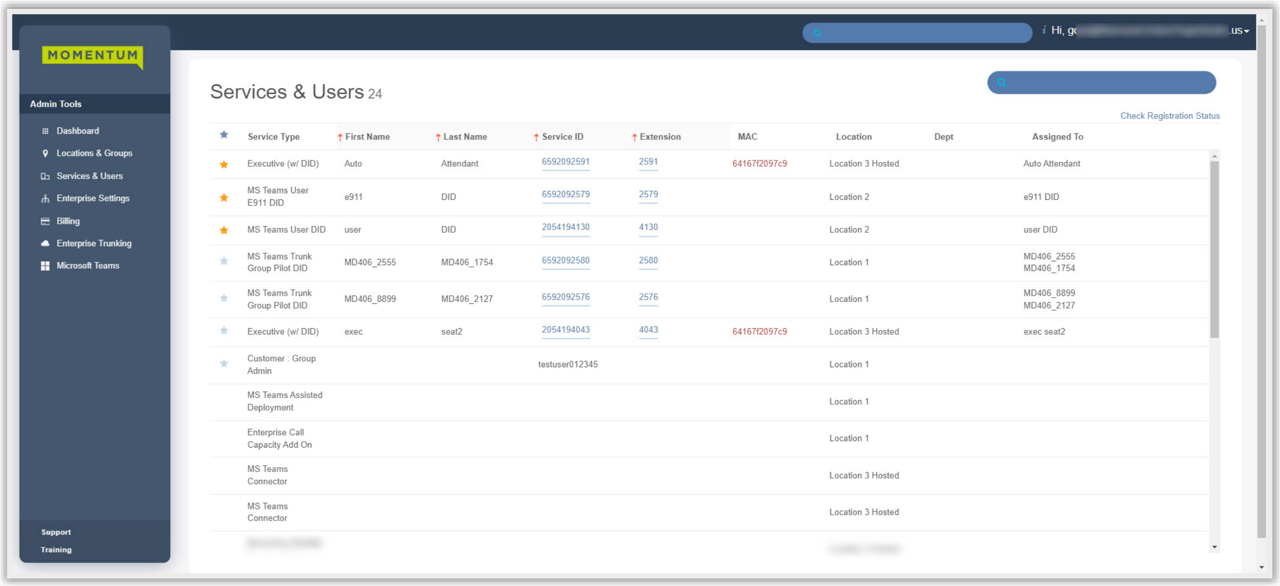
If you are unsure about your setup, please contact your Service Provider's Customer Support to request assistance to complete the appropriate Call Recording configuration changes.



1. Define or select from the following options, as needed:
   Use Group name for Calling Line Identity: Click within the check box ☑ to Enable
2. If set to Enabled, make selections from the following, as needed:
   - Calling Line ID Group Name: Enter the group name that displays in CallerID
   - 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.
3. Click the Save button to submit the changes and close the dialog.

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 Registration Status, or go directly to a specific account dashboard to review and manage settings.



Section Search

Locate any data found within the table below.

Check Registration Status

Poll NEPS and BroadSoft provisioned device registration status and update.

Favorites ★

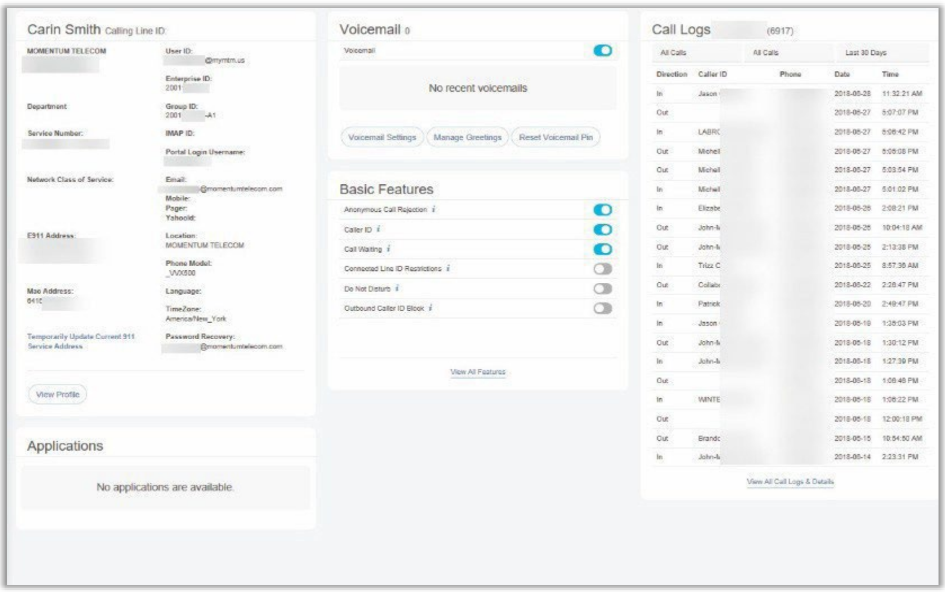
The first column allows Admins to set Favorites ★ for easy Dashboard access.

Service ID & Ext

The links under the Service ID and Ext columns open the User's 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:



User Dashboard Sections

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. The View All Voicemails link provides access to review and manage all undeleted voicemails if there are more available than can be displayed within the dashboard card. Tools are also provided for the user or Admin to Manage Voicemail Settings, Reset Voicemail Pin, Manage Voicemail Greetings, and Manage Voicemail Message Deposit settings.

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

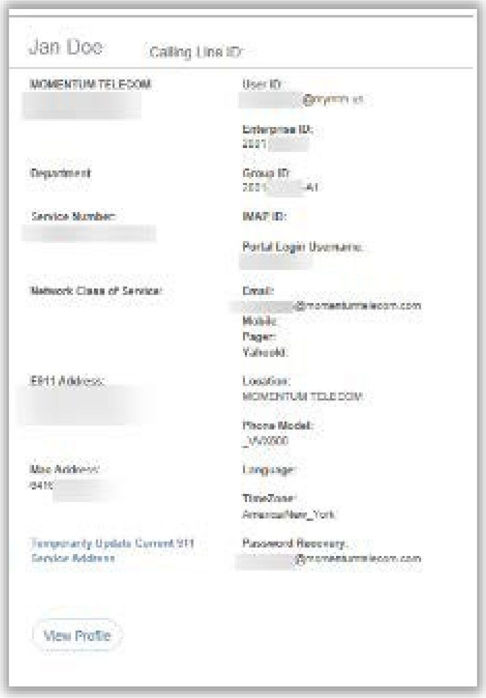
This card displays the On/**Off** feature settings for easy access and the View All Features & Services link offers direct access to the user's Settings page to manage all assigned services and features on their account.

User Profile

This section of the dashboard displays a summary of your account profile information (Name, Address, Phone Number, User ID, Device model, etc.), and provides links to set up a temporary e911 location, review the entire profile, and access your password and directory profile management tools.

The My Profile link found in the toolbar (the drop down by your username) also offers another access point to view the Profile.

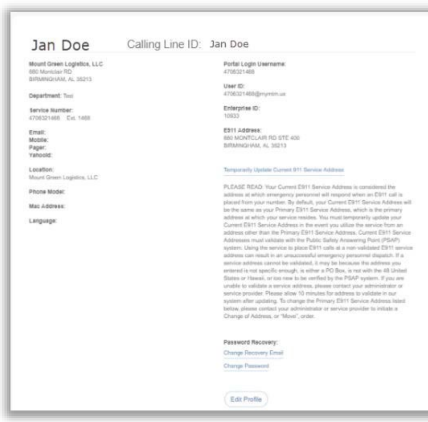
The following features and access links are all provided via the Profile card on the My (User) Services Dashboard:



View Profile

View Profile Click on the View Profile button to review your current contact information and access the management tools for your password, email notification settings, and temporary e911 location changes.

Secondary links to Edit Profile, Change Password and other setting tools are also included in the View Profile dialog.



Change e911 Address (Temporary)

The Temporarily Update Current 911 Service Address link opens the dialog that allows the user to add and validate temporary e911 Service Address locations for use when traveling to different locations with the associated device. You must temporarily update your e911 Service Address in the event you may need to access emergency services from an address other than the Primary e911 Service Address, and then reset it back to the Primary e911 Service Address upon your return.

Note: Any time a user changes the e911 address on their profile - either Temporary or Primary - fees may be incurred for the organization and the System Admin will receive an email notification of the change.

Add a Temporary e911 Service Address

1. Click on the Temporarily Update Current 911 Service Address link to begin.
2. Enter the complete Address information for the temporary address you wish to use in the fields provided - please *include specifics like building, department, floor, N/S/E/W, and similar helpful information (a Dispatchable Location) that can be sent to the PSAP to help emergency responders find you* quickly during an emergency.
3. Click on the Save button to submit the information and receive a Success! message when the address confirmation process completes.

Please allow up to 10 minutes for the address to validate after updating. If the address cannot be validated, it may be because the information is not specific enough, is for a PO Box, is not within the continental United States, Puerto Rico, or Hawaii, or is too new to be verified by the PSAP system. If you are unable to validate a service address, please contact your Administrator or customer service at the service provider for assistance.

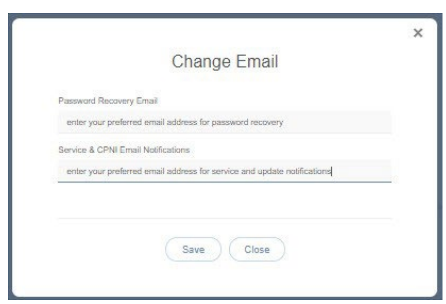
Edit Primary e911 Service Address

By default, your e911 Service Address is the primary address of record for your service account. If a change is required, please contact your Administrator or service provider to initiate a Change of Address (or "Move" order) to change the Primary E911 Service Address permanently.

Reset to Primary e911 Service Address

1. Click on the Temporarily Update Current 911 Service Address link in the View Profile dialog.
2. Click on the Reset to Primary link.
3. Click on the Save button to submit the change and receive a Success! message when it is completed.

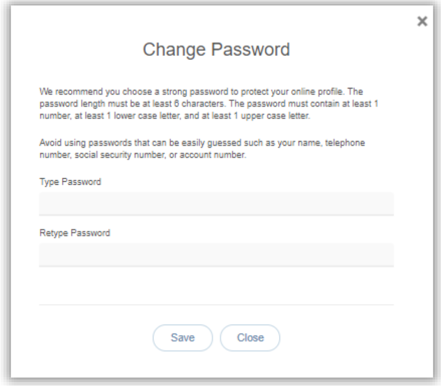
Change Recovery/Notification Email



1. Click the Change Recovery Email link to open the Change Email dialog.
2. Password Recovery Email: Enter or change the email address on file for recovering your login information. The system will send your password to this email address.
3. Service & CPNI Email Notifications: Enter or change the email address on file for receipt of notifications from the provider. The system will send service notifications to this email address.
4. Click on the Save button when your edits are complete.

Change Password

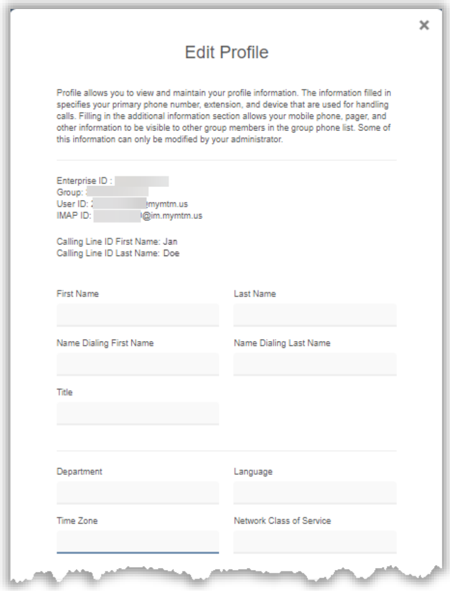
The Change Password link provides direct access to update your unified communications password information.



1. Click on the Change Password link.
2. Type a new Password.
3. Retype to verify.
4. Click the Save button.
   New passwords must be 8 or more characters and contain at least 1 number or special character, 1 lower case letter, and 1 upper case letter.

Edit Profile

The Edit Profile button provides access to modify additional profile contact information. The information you include (mobile phone, email, etc.) is visible to other group members whenviewing the directory or phone list.



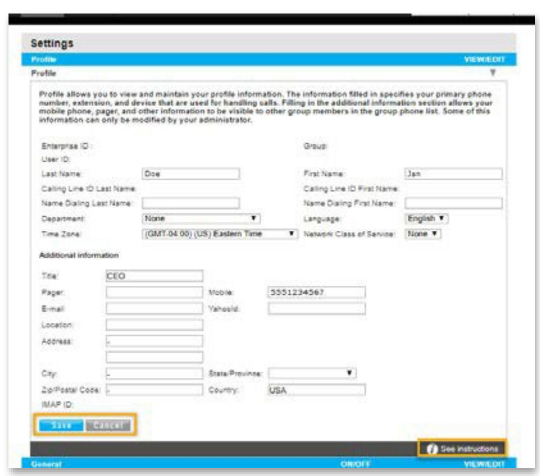
In View Profile:

1. Click the Edit Profile button to view/edit the following options:
   - Preferred Name (First/Last)
   - Preferred Name when dialing out (First/Last)
   - Work Information (Title, Department)
   - Language preference
   - Time Zone
   - Class of Service
   - Additional Contact Information (phone, email, personal address)
2. Click the Save button when you are finished to update the data.

An Administrator is needed to modify some of the Profile information.
Contact your Administrator for assistance with the settings you cannot modify.

Additional Profile Settings

Access to additional profile settings for the directory and monitoring services is provided in the Settings page.

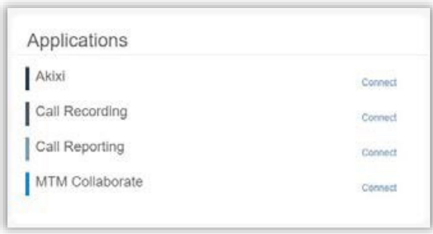


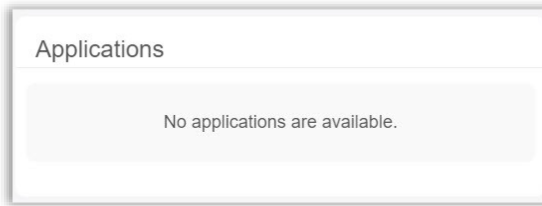
See Also: Profile (in Settings).

Applications

The Applications card in the Dashboard displays links to any additional applications related to the account.My Cloud Services offers an easy way to connect directly to the sign in or landing page of the corresponding service or application in this section of the Dashboard. Contact your administrator for assistance if you require assistance to access add-on modules on your account.

1. Click on the Connect link to open and access the sign in / landing page or application of the corresponding option in a new browser window.

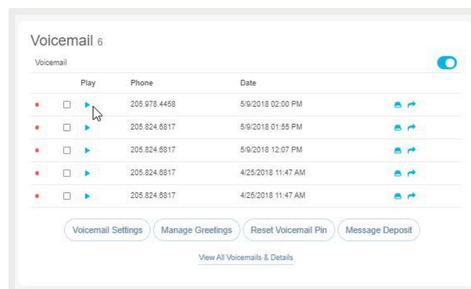




If no additional applications are included with the service, this card displays a simple “No applications are available.” message.

Voicemail

The Voicemail card displays a list of your current un-deleted voicemail messages and the common voicemail feature management tools in the Dashboard. It offers quick access to any additional messages, Voicemail feature tools, and to update the Voicemail PIN information. The red dot • next to a Voicemail indicates an un-played message.



Many Voicemail settings are also found within the Voicemail Edit *view in the Settings page.*

Enable/Disable Voicemail

The **On**/Off toggle at the top of the Voicemail card enables or disables the Voicemail feature

Play Voicemail

Click on the Play icon next to a voicemail in the list to listen to the message online.

Download Voicemail

Click on the Download icon next to a message to download and save a copy of the message file to a location on your system.

Forward Voicemail

Click on the Forward icon next to a message to send the voicemail .wav file to an email address.

Voicemail Block | Delete

☐ Click to place a checkmark ✓ in the box next to a Voicemail to view the Block | Delete options above. Simply click on the option you prefer to perform the action.

- Block disallows future calls from the number without providing a warning message to the caller.
- Delete immediately removes the Voicemail from your dashboard/phone list and deletes the record/recording fully from the database at midnight the day you elected to delete it.

View All Voicemails

Click on the View All Voicemails link below the list to open the dialog and review or manage any additional voicemails.

Reset Voicemail Pin

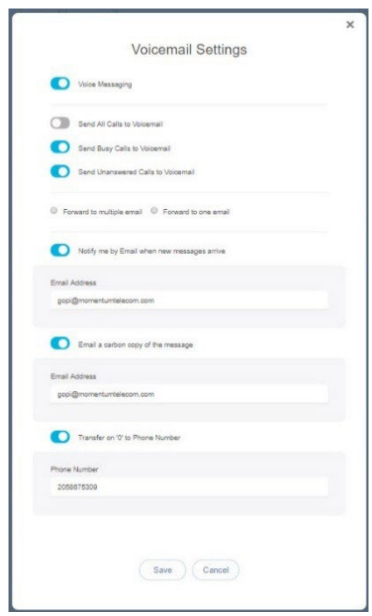
Reset Voicemail Pin

Click on the Reset Voicemail Pin button to reset the current PIN to the default (8462) to allow a new Voicemail PIN to be safely entered via the telephone/device.

Manage Voicemail Settings

Voicemail Settings

The Voicemail Settings button opens the Voicemail Settings pop-up dialog where the following voicemail settings may be turned on or off, and email notifications and forwarding on '0' may be managed.



Always click the Save button once changes are made to submit new information. A Success! Message displays when an update to Voicemail Settings is completed.

Voice Messaging

On | Off – Turns the Voicemail feature on or off.

Send All Calls to Voicemail

On | Off – All calls are sent to voicemail while this feature is enabled.

Send Busy Calls to Voicemail

On | Off – When this setting is enabled, new incoming calls are sent directly to voicemail if the line is already in use (busy).

Send Unanswered Calls to Voicemail

On | Off – When this setting is enabled, calls that go unanswered after a specified number of rings are sent to voicemail by the system.

Forward to Multiple Emails

On | Off– (Unified Communications) Saves the voicemail recording in the portal/voicemail inbox and sends voicemail recording files to the email address(es) specified. Click the toggle to turn On (enable), then enter at least one 1 and up to five (5) email addresses separated by commas in the text field that is provided.

Forward to One Email

On | Off – Sends the voicemail recording file to a specified email address. Note: Enabling this option sendsthe message recordings to the email address and does <u>not</u> save the voicemails to the portal or voicemail inbox. Click the toggle to turn On (enable) and then enter the email address in the text field provided.

Notify Me by Email When New Messages Arrive

On | Off – When enabled, a simple new voicemail received notification email is sent to the address that is defined in the text field provided.

Email a Carbon Copy of the Message

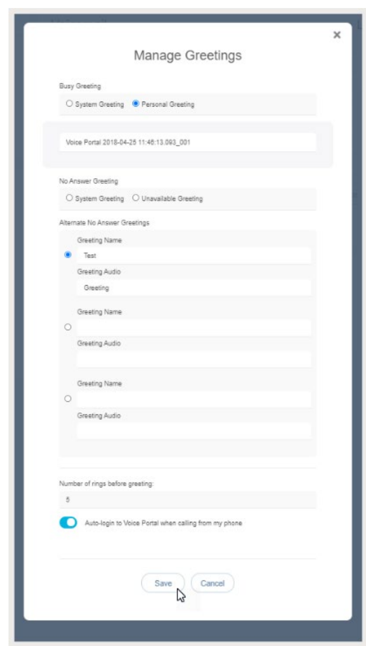
On | Off – When enabled, a copy of the new voicemail notification email is sent to the email address defined in the text field provided.

Transfer on '0' to Phone Number

On | Off – When set to ON and a 10-digit phone number is defined, incoming callers are given the option to press '**0**' to transfer.

Manage Voicemail Greetings

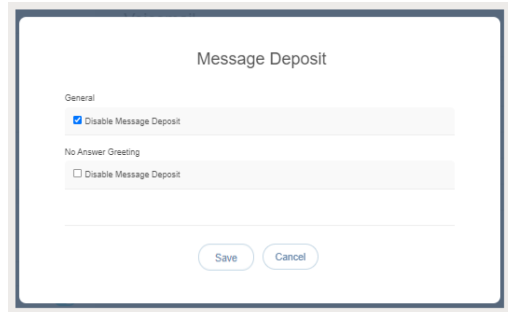
The Voicemail card displays the Manage Greetings button, providing access to select the greetings used when a caller is sent to voicemail. The system provides a default greeting, so these settings are optional.



1. Click on the Manage Greetings [Manage Greetings] button.
2. Select or define the following as needed to setup voicemail greetings:
   - Busy Greeting: Click to select System Greeting (default) or Personal Greeting. If Personal Greeting is selected, use the adjacent drop-down menu to choose an Announcement already uploaded (in the Announcement Repository) for use.
   - No Answer Greeting: (Optional) Click to select *System Greeting* (default) or the *Unavailable Greeting* option.
   - Alternate No Answer Greetings: This dialog allows the user to prepare multiple no answer greetings that can be used and then select the one that is in use. Click to select an alternate No Answer greeting that was already uploaded for use.
   - Number of rings before greeting – Select an amount of rings (from 1-10) that will occur before the caller is sent to voicemail and will hear the greeting currently in use.
   - Auto-login to Voice Portal when calling from my phone: Click to enable this setting to allow the system to keep you logged into the Voice Portal on the phone for quick access.
3. Click the Save button to submit the changes, close the dialog, and return to the Dashboard view. Return to this dialog to edit settings in the future.
   See also: Announcement Repository

Message Deposit

The Voicemail card displays a quick access button for Message Deposit settings. These settings allow the user to quickly disable the ability for incoming callers to leave a message after hearing the user's voicemail greeting. By default, Message Deposit is always turned **On** which allows callers to leave a message and hear the menu options. This feature works with the Voicemail Greeting Settings.



Note: When Message Deposit is disabled, the Voicemail Menu is disabled. This means that incoming callers won't hear the menu options and the user will not hear menu options announced when logging in to manage voicemails if Message Deposit is disabled.

Disable Message Deposit

In the Voicemail card on the Dashboard:

1. Click on the Message Deposit Message Deposit button to view the Message Deposit dialog.
2. Choose the option to use:
   - General – A check mark ☑ here disables message deposit for all calls that go to voicemail.
   - No Answer Greeting – A check mark ☑ here disables message deposit for calls that are sent to voicemail when a No Answer Greeting is in use.
3. Click on the Save button to submit the change, close the dialog, and return to the Dashboard. Return to this dialog to turn off the setting when it is no longer needed.

Call Logs

The Call Logs card displays a list of the latest incoming and outgoing calls on the account with filters to review specific call types and date ranges. It also provides easy access to review all available call log data for the past 90 days – up to 1000 calls via the View All Call Logs & Details link.

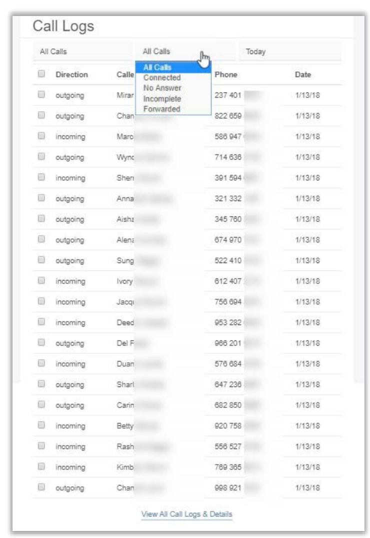
Filter Call Logs

Within the Call Logs dashboard card, multiple *Filters* are provided that allow users to select specific call types and date ranges to review. The Call Logs filter options include:

Call Type
All Calls
Incoming Calls
Outgoing Calls

Call ConnectionType
All Calls
Connected
No Answer
Incomplete
Forwarded

Date
Today
Yesterday
Last 7 Days
Last 30 Days
Last 90 Days
Custom



View All Call Logs & Details

The View All Call Logs & Details link at the bottom of the Call Logs card offers easy access to review a detailed list of up to 1000 calls over the past 90 days. The same filters offered within the dashboard are available within the larger view to make it simple to locate information about specific call types or calls that occurred within specific time-frames, and a link to Export Call Logs allows the user to download the data to an excel spreadsheet format.

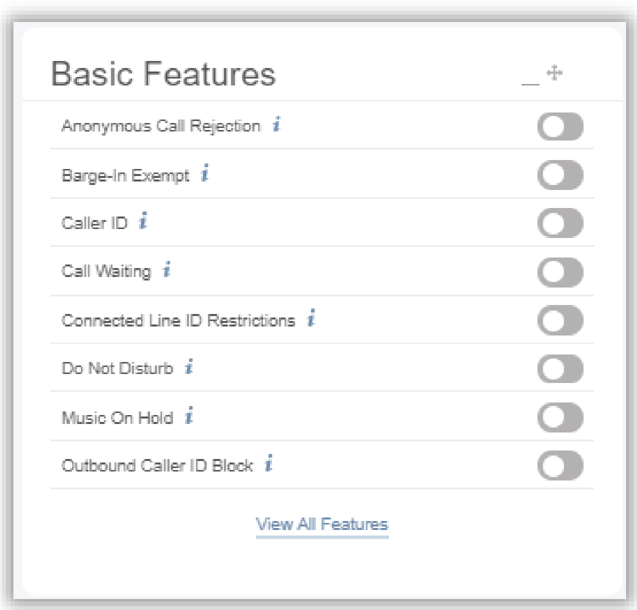
Basic Features

The Basic Features Dashboard card provides quick access to your On/Off feature settings and information about each. This dashboard section also provides a View All Features link that opens the Settings page for review and management of additional service features.

Each item displayed within the Basic Features card on the Dashboard is an **On / Off** setting for the individual user account. Descriptions of the features that are provided for management here display as pop-up information by placing the *i* cursor over the 'I' icon next to an item.

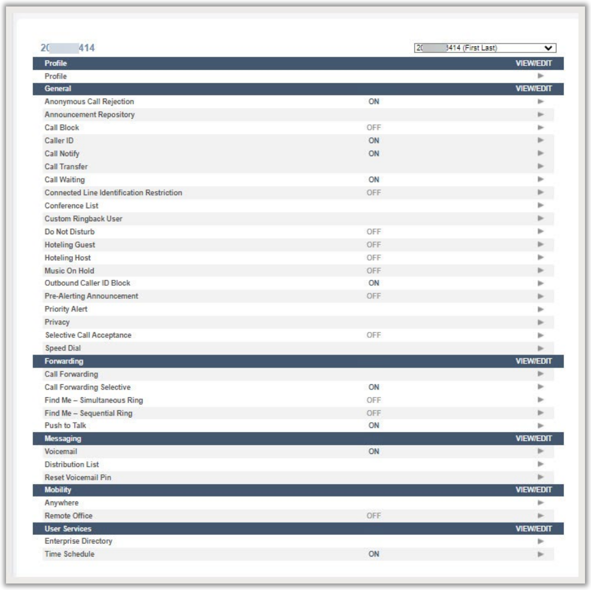
The slider toggles in the Basic Features card allow the user to set each available option to On (enabled) or Off (disabled) quickly and easily.

Additional settings may be managed by clicking on the View All Features link at the bottom of this dashboard card. This opens the full list of feature settings on the user's account for review and management.



Working with User Settings

Click on the View All Features link at the bottom of the Basic Features Dashboard Card to open the Settings page, which lists the features and services that are available to the user in an easy to read format and provides access to View and to Edit the settings for each feature listed.



20 414 | 20 3414 (First Last)

Profile		VIEW/EDIT
Profile		▶
General		**VIEW/EDIT**
Anonymous Call Rejection	ON	▶
Announcement Repository		▶
Call Block	OFF	▶
Caller ID	ON	▶
Call Notify	ON	▶
Call Transfer		▶
Call Waiting	ON	▶
Connected Line Identification Restriction	OFF	▶
Conference List		▶
Custom Ringback User		▶
Do Not Disturb	OFF	▶
Hoteling Guest	OFF	▶
Hoteling Host	OFF	▶
Music On Hold	OFF	▶
Outbound Caller ID Block	ON	▶
Pre-Alerting Announcement	OFF	▶
Priority Alert		▶
Privacy		▶
Selective Call Acceptance	OFF	▶
Speed Dial		▶
Forwarding		**VIEW/EDIT**
Call Forwarding		▶
Call Forwarding Selective	ON	▶
Find Me – Simultaneous Ring	OFF	▶
Find Me – Sequential Ring	OFF	▶
Push to Talk	ON	▶
Messaging		**VIEW/EDIT**
Voicemail	ON	▶
Distribution List		▶
Reset Voicemail Pin		▶
Mobility		**VIEW/EDIT**
Anywhere		▶
Remote Office	OFF	▶
User Services		**VIEW/EDIT**
Enterprise Directory		▶
Time Schedule	ON	▶

- Features are generally grouped by type to make similar or related features easy to locate.
- On/Off features show their current status within the table (and on the Dashboard).
- The drop-down selection tool above the table allows authorized Admins to quickly select and edit user-level feature settings for the other seats/users they are permitted to manage.
- The arrow ▶ undert he 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 via the Basic Features Dashboard Card and through the user's device using phone codes, AKA: Star Codes, when set to *Enabled*. (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 users or all organizations.

Access the Settings Page

In the Dashboard: Click on the View All Features link in the *Basic Features* card on the User's Dashboard to open the Settings page.

View / Edit User Feature Settings

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. Features that may be managed here will vary and are dependent upon the services offered to the user based on seat type and add-ons.

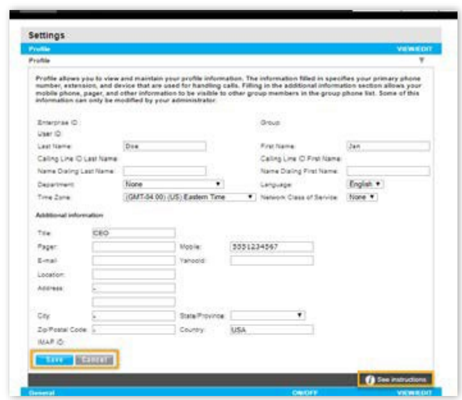
Manage Settings for Multiple Lines/Accounts

Where multiple lines are assigned and may be viewed by a User or Admin, the drop-down tool within the Settings view (just above the table on the top right) offers the ability to switch between those lines to manage the feature settings for all accounts that are available to the user (or Administrator) for multiple lines.

1. Click on the drop-down tool to view a list of any additional lines for selection.
2. Click on an option in the list to choose and begin working with that line's settings.
   The settings for the new line will display in the table below for review/management.
3. *Repeat to review or make changes to additional account/line settings to which access is provided.*
   Note: The system will also help the user or Administrator to quickly get back to the dashboard of the account/line they started with by displaying it at the top of the Left Navigation panel at all times.

Profile

The secondary Profile section of the *Settings* page offers additional fields for data that may be added to display in directories and phone lists. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

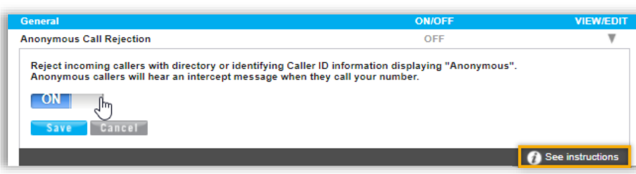


Manage Profile

1. Enter any information that you wish to make available in lists or directories.
2. Click the Save button to update and return to the Settings page.

Anonymous Call Rejection

On | **Off** setting. Anonymous Call Rejection tells the system to play an intercept message and reject (block) incoming calls from anyone with Caller ID set to 'Anonymous'. Because the calls are blocked and will not ring through, Call Logging, etc. are disabled when a call triggers this feature.
Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

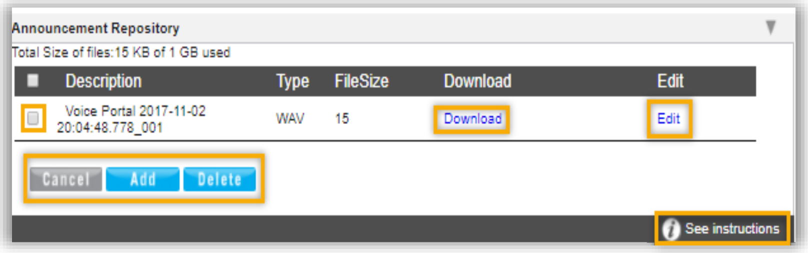


Manage Anonymous Call Rejection

1. Slide the toggle to ON or Off.
2. Click the Save button.

Announcement Repository

The Announcement Repository service offers the ability to upload and store message .wav files for use as Voicemail greetings and announcement messages.



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

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add an Announcement File

1. Click on the Add button to begin.
2. Type the Name to be displayed in 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 to submit the change and return to Settings.

Download an Announcement File

1. Click on the Download link.
2. Navigate to and select the local folder you wish to use to save a copy of the file.

Edit an Announcement File

1. Click on the Edit link next to an Announcement listing to open its *Edit* view and make changes.
2. Click on the Save button to submit changes and close this dialog.

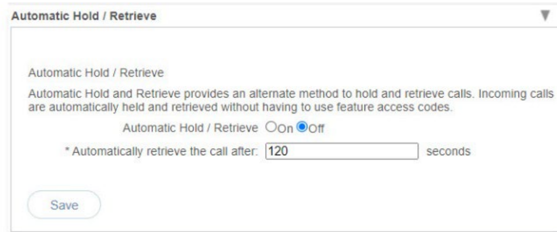
Delete an Announcement File

Use Caution. The removal action is immediate and cannot be undone.

1. Click to place a check ☑ in the box next to an Announcement in the file list to select it.
2. Click on the Delete button.

Automatic Hold / Retrieve

This setting provides a method to place incoming calls on hold and retrieve them automatically without using the feature access (Star) codes.

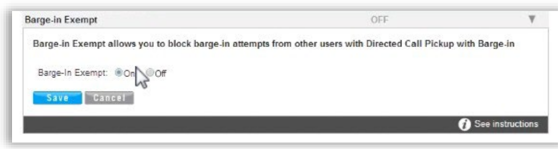


Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

1. Select and/or enter the following:
   - Automatic Hold / Retrieve On Off - Click to set to ○ **On** or ⊙ **Off** (default)
   - Automatically retrieve the call after: _____
     - Enter the number of seconds the call will remain on hold before it is automatically retrieved to the line.
2. Click the Save button when finished to submit the changes and close the dialog.

Barge-In Exempt

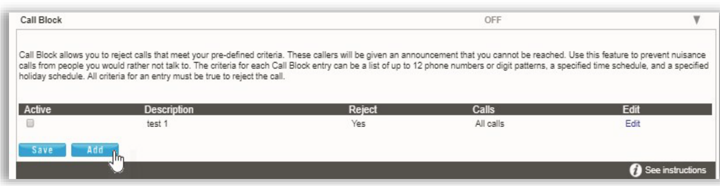
On | Off Setting. When enabled (ON), barge in attempts clickon the adjacent drop-down arrow the adjacent drop-down arrow ► to access this feature's *Edit* view.



Call Block

Use the Call Block feature to define criteria that will block calls from people you would rather not talk to, limit or forward calls from specific numbers, or even create a list of numbers you always want to accept even when Call Block is enabled.

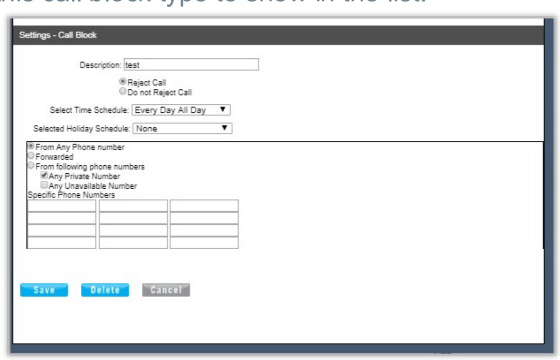
Incoming calls that meet all criteria defined here are notified that you cannot be reached, and the call is disconnected. These calls are not logged.



Add a Call Block

1. Click on the Add button to begin defining new Call Block criteria.
2. Define the following criteria, as needed:
   - Description – Required: A short descriptive title for this call block type to show in the list.
   - Reject Call – Optional: Click to setup this list to Block Calls when your criteria are met.
   - Do Not Reject Call – Optional: Click to setup this list to accept calls from specific numbers when the criteria are met.
   - Select Time Schedule – Optional: Choose a Time Schedule from the drop-down menu. OR...
   - Selected Holiday Schedule – Optional: Choose a Holiday Schedule from the drop-down menu.

     Note: *Only one schedule type (Time or Holiday) can be selected at a time.*
   - From Any Number – Optional: Select if any number dialed in will be accepted or blocked for the schedule you selected.



- Forwarded – Optional: Select if incoming forwarded numbers will be blocked.
- From Following Phone Numbers – Select to define individual numbers to accept or block.
- Any Private Number – Select to trigger on incoming calls with "Private" Call ID.
- Any Unavailable Number – Select to trigger on incoming calls with "Unavailable" Call ID.
- Specific Phone Numbers – Select and then enter up to twelve (12) 10-digit phone numbers.

3. Click the Save button when finished to submit the call block criteria and close the view.

Edit a Call Block

1. Click on the Edit link next to a Call Block entry.
2. Make changes to the Description, Trigger Options, and/or the specified Phone Numbers.
3. Click the Save button when finished.

Activate a Call Block

1. Click to place a checkmark ☑ next to a Call Block entry to activate that selection.
2. Click the Save button to submit the change and close the *Edit* view.

Delete a Call Block

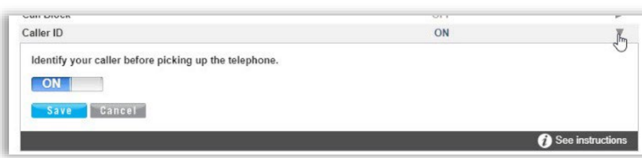
Use caution. The item is immediately removed when Delete is selected.

1. Click on the *Edit* link next to a Call Block entry.
2. Click the Delete button to remove the selected Call Block and its information from the system.

Caller ID

On | Off Feature. Caller ID allows the user to turn the *view Caller ID for incoming calls* feature on or off. When enabled, it may take up to two (2) rings to see the available Caller ID information on your device. Note: The Off option deactivates Caller ID for incoming calls, but not for your outgoing calls. See Outbound Caller ID Block.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

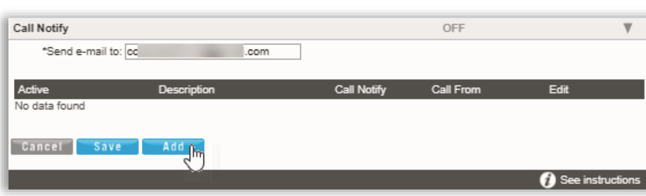


Manage Caller ID

1. Slide the toggle to ON to enable or Off to disable.
2. Click on the Save button to submit the change and close the *Edit* view.

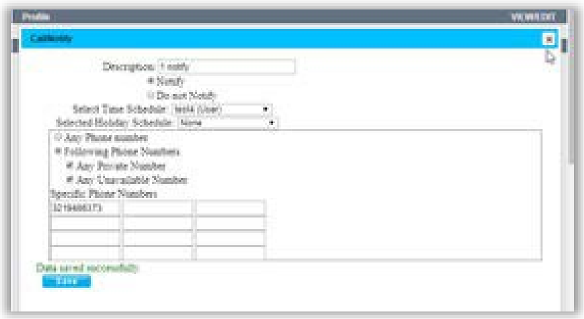
Call Notify

The Call Notify service allows users to define the recipient address for email notifications when specific types of calls are received. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.



Setup Call Notify

1. Send email to: Enter the email address for call notifications.
2. Click the Add button to define new *Call Notify* criteria.
3. **Description**: Enter a name to display in lists.
4. Select or define the following options, as needed:
   - Set to Notify or Do Not Notify.
   - Select Time Schedule: Optional: Select a pre-defined Time Schedule - OR -
   - Selected Holiday Schedule: Optional: Select a Holiday Schedule.
     Note: Only one schedule type (Time or Holiday) may be selected for use in each Call Notify event.
   - Call Policies: Select an option from the following - From Any Phone Number, Following Phone Numbers, Any Private Numbers, Any Unavailable Numbers, and/or specify up to twelve (12) Phone Numbers, as needed.



5. Click the Save button and wait for the Data Saved Successfully! message to display.
6. Click on the ☒ Exit icon to close the criteria dialog.
7. Click the Save button to update the system and close the *Edit* view.

Activate Call Notify

1. Click to place a check in the box ☑ under the Active column for a listing to activate it.

Edit Call Notify Settings

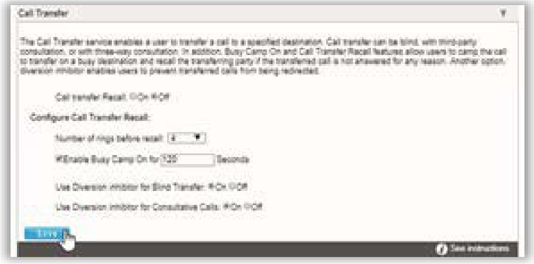
1. Click the Edit link next to a *Call Notify* listing.
2. Make changes as needed.
3. Click the Save button and wait for the Data Saved Successfully! message to display.
4. Click on the ☒ Exit icon to close the dialog.
5. Click on the Save button to update the system and return to the Settings list view.

Delete Call Notify

1. Click the Edit link next to the desired listing.
2. Click the Delete button and wait for the Deleted Successfully! message to display.
3. Click on the ☒ Exit icon to close the dialog.
4. Click on the Save button to update the list and return to Settings.

Call Transfer (Recall)

The Call Transfer service enables a user to transfer calls to specified destinations as Blind, Consultative, or 3-way Consultative Transfers. This setting defines the criteria to automatically recall your transferred calls when they are not answered for any reason, and/or to prevent your transferred calls from being automatically redirected by the destination user's settings. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.



Manage Call Transfer Recalls

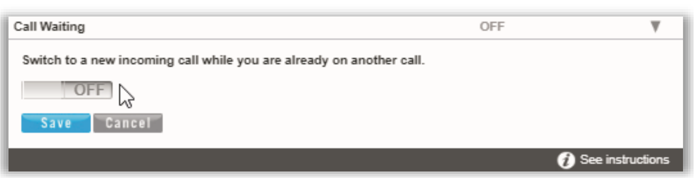
1. Click within the appropriate radial button to turn the service ⦿ **On** or ○ Off.
2. Configure the following setting options, as needed:
   - Number of rings before Recall: Select a number of rings from the drop-down menu.
   - Enable Busy Camp On for x Seconds: Turn on 'busy' for a set time. Click to place a check in the box to ☑ enable (or ☐ disable) and enter a number of seconds in the adjacent field.
   - Use Diversion Inhibitor for Blind Transfer: Disallow auto-redirects on Blind Transfers. Click within a radial button to set to ⦿ On or ○ Off.
   - Use Diversion Inhibitor for Consultative Transfer: Disallow auto-redirects on Consultative Transfers. Click within a radial button to set to ⦿ On or ○ Off.
3. Click on the Save button to submit the setup/change(s) and close the *Edit* view.

Call Waiting

On|Off Setting. The Call Waiting service allows users to receive calls while their line is in use, see the callerID of the new caller, and decide whether to automatically place the current caller on hold and answer the second call - or let the second call go to Voicemail (if enabled). Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

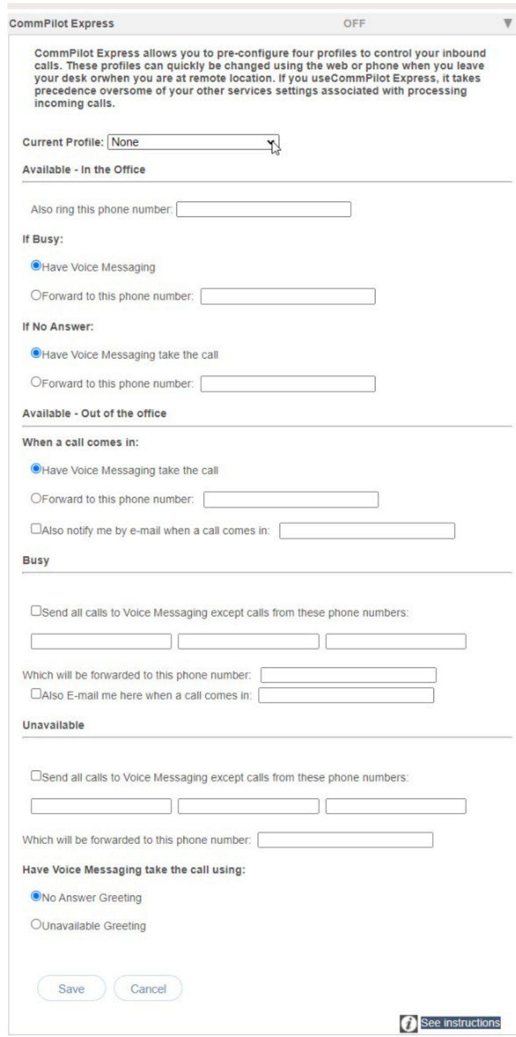
Manage Call Waiting

1. Slide the toggle to **ON** or Off and click on the Save button to submit the change and close the *Edit* view.



CommPilot Express

The CommPilot Express settings allow a user to define profiles that control what happens when an inbound call arrives and the CommPilot presence indicates that user is Available - In the office, Available - out of office, Busy, or Unavailable. Once defined, saved, and enabled, each profile can be managed in this area of the portal or via the phone/device (where supported). Note: when enabled, CommPilot Express will take precedence over some other service settings that relate to incoming call behavior. The use of these *settings and profiles is optional*. *If available* - Click the adjacent drop-down arrow ► to access this feature's *Edit* view.



1. To manage CommPilot Express settings, select or enter information for the following:
   - ❖ Current Profile: Choose from the drop-down menu options to select a saved profile.
   - ❖ **Available – In the Office**
     - Also ring this phone number: _______ - Enter the alternate 10-digit phone number to simultaneously ring.

     If Busy:

     - ○ Have Voice Messaging (take the call) - Click to ⦿ select/enable calls to be sent to voicemail when *busy*, OR
     - ○ Forward to this phone number _____ - Click to ⦿ select/enable, and enter the 10-digit phone number to which the system should forward calls when in office but busy

     If No Answer:

     - ○ Have Voice Messaging take the call - Click to ⦿ select/enable and instruct the system to send calls to voicemail if calls go unanswered, OR
     - ○ Forward to this phone number: ______ - Click to ⦿ select/enable and enter the 10 digit phone number to which the system should forward calls in the adjacent field
   - ❖ **Available – Out of Office**
     - ○ Have Voice Messaging take the call – Click to enable and instruct the system to send calls to voicemail when out of office, OR
     - ○ Forward to this phone number: ______ - Click to enable and enter the 10 digit phone number wo which the system should forward calls in the adjacent field.
     - ☐ Also notify me by e-mail when a call comes in: ______ - Click to ☑ select/enable and enter the email address the system should use to send notifications for incoming calls while out of office.
   - ❖ **Busy**
     - ○ Send all calls to Voice Messaging except calls from these phone numbers: - Click to enable and enter up to three (3) 10-digit phone numbers in the fields directly below.
     - Which will be forwarded to this phone number: Enter a 10-digit phone number in the adjacent field to which *only* calls from the phone numbers listed above will be forwarded.

- ☐ Also E-mail me here when a call comes in: - Click to ☑ select/enable and enter the email address the system should send notifications to when a call comes in while you are *Busy*.

❖ Unavailable
- ○ Send all calls to Voice Messaging except calls from these phone numbers: - Click to enable and enter up to three (3) 10-digit phone numbers in the fields directly below.
- Which will be forwarded to this phone number: Enter a 10-digit phone number in the adjacent field to which *only* calls from the phone numbers listed above will be forwarded.

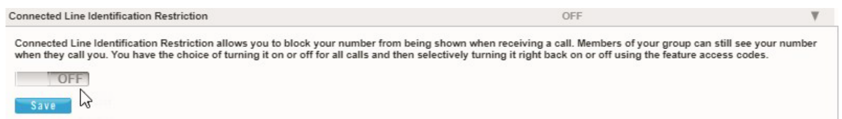
❖ Have Voice Messaging take the call using:
- ○ No Answer Greeting - Click to ⦿ select/enable to instruct the system to use the No Answer Greeting you've setup for voicemails - OR
- ○ Unavailable Greeting - Click to ⦿ select/enable to instruct the system to use the Unavailable Greeting you've setup for voicemails.

2. Click on the Save button to submit the changes to the profile and exit the dialog - or click the Cancel button to exit without saving any changes.

Connected Line Identification Restriction

On | Off Setting. The Connected Line Identification Restriction feature allows you to block your number from being shown when receiving a call. Members of your group can still see your number when they call you.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

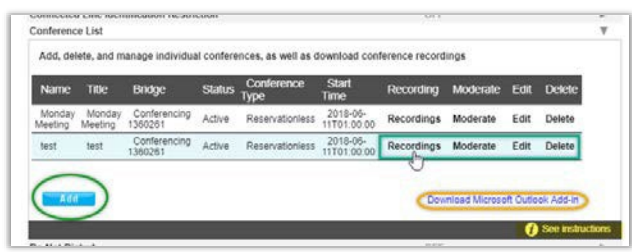


Manage Connected Line ID Restriction

1. Slide the toggle to **ON** or Off and click on the Save button to submit the change and close the *Edit* view.

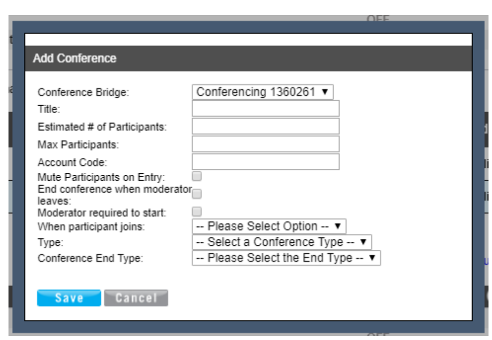
Conference List

The Conference List service allows provisioned users to manage settings for online audio conferences, the participants and moderators, and the conference recording downloads. Click the adjacent drop-down arrow ► to access this feature's setting management tools.



Add a Conference Listing

1. Click on the Add button to create a new conference.
2. Select the appropriate Conference Bridge type from the drop-down menu.
3. Define the following:
   - ❖ Title (a short description of the conference)
   - ❖ Estimated Number of Participants ___
   - ❖ Maximum Number of Participants ___

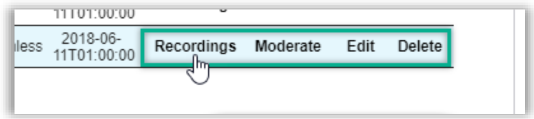


- Account Code________(an x-digit code for participants to use to access the conference)

4. Click to place a check within the adjacent box ☑ to enable the following options, as needed:
   - Mute Participants on Entry
   - End Conference When Moderator Leaves
   - Moderator Required to Start
5. Define When Participant Joins: Select the appropriate action from the drop-down menu.
6. Define Type: Select from *One Time* (Define the Date, Start Time, and Duration in HH and MM), *Reservationless* (Define the Start Date and End Type), and *Recurring* (Define the Recurrence information as required)
7. Click the Save button to add the new Conference setup and close the criteria *view*.
8. Click the Save button in *Conference List* settings to update the system and exit the *Edit* view.

Manage Conference Recordings

The following recording management tools are provided in the *Edit* view:



A. Click on the Recordings link next to the appropriate Conference Listing to review any recording details and options.
B. Click on the Download option and follow the steps to save a recording to a local file.
C. Click on the Delete option next to a listing to remove the selected recording from the archive.

Edit a Conference Listing

1. Click on the *Edit* option next to the appropriate Conference listing to open the criteria setup view.
2. Make changes to the setup, as needed.
3. Click on the Save button to update the conference list information.

Delete a Conference Listing

Use Caution. The item and all its information are immediately removed from the system.

1. Click on the Delete option next to the appropriate Conference Listing to *Immediately* remove it.

Launch Moderator Tool

1. Click on the Moderate link next to the appropriate Conference Listing.
2. Enter your Password.
3. Click the Launch Moderator Tool button to open the pop-up view for the conference.

Download the Conference Microsoft Outlook Add-In

1. Click on the Download the Microsoft Outlook Add-In Link at the bottom of the *Conference List settings* view and follow the instructions to install the plug-in.

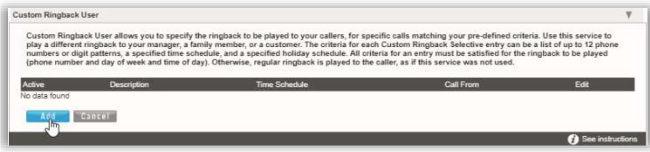
Manage Conference Moderators

1. Click Edit next to the appropriate Conference listing.
2. Highlight the appropriate Available Users and use the arrows ⏵⏴ to move them to/from the ConferenceModerators section.
3. Click the Save button to return to the Settings list when finished.

Custom Ringback User

As a Custom Ringback User, you can select a ringback message to be played to specified callers based on your pre-defined criteria.

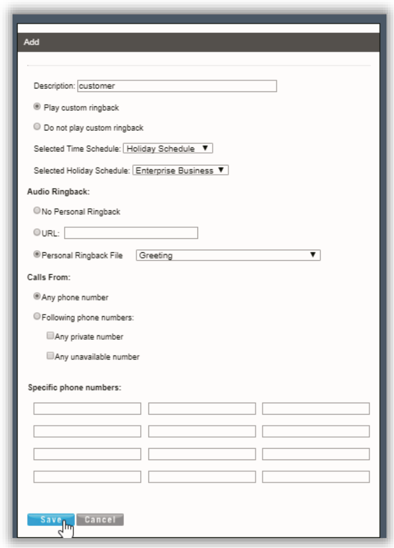
The criteria for each Custom Ringback you define can include up to 12 phone numbers or digit patterns and specific schedules. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.



Add a Custom Ringback List

1. Click on the Add button to begin defining a Custom Ringback listing.
2. Description: Type a name that will display in the Custom Ringback list.
3. Enter or select from the following options, as needed:
   - Play custom Ringback: Click within the ⦿ radial button to enable
   - Do not play custom ringback: Click within the ⦿ radial button to enable
   - Selected Time Schedule: Use the drop-down menu to select the correct option. **OR**...
   - Selected Holiday Schedule: Use the drop-down menu to select the correct option.

     Note: *Only one schedule type (Time or Holiday) can be defined per list.*
   - Audio Ringback: Click within he appropriate radio button to enable ⦿ *No personal Ringback*, or *URL*, or *Personal Ringback File* and enter or use the drop-down menus toinclude the information required for your selection.
   - Calls From: Click to select ⦿ *Any Phone Number* or ⦿ *Following Phone Numbers*
   - As Needed: Click within the adjacent check boxes ☑ to include calls from Any private number, and/orAny unavailable number.
   - Specific Phone Numbers: Enter the 10-digit numbers in the fields provided, as needed to define calls from specific numbers.
4. Click on the Save button to submit the new Custom Ringback listing and close the *Edit* view.



Edit a Custom Ringback List

1. Click on the Edit link adjacent to the desired Custom Ringback listing.
2. Make changes to the setting options, as necessary.
3. Click on the Save button to submit the changes and return to Settings.

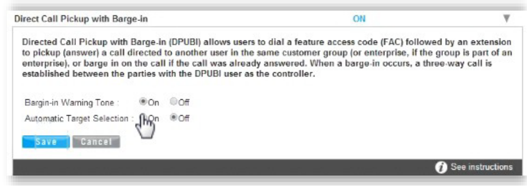
Delete a Custom Ringback List

Use Caution. Once Delete is selected, the item and all its information are immediately removed from the system.

1. Click on the Edit link adjacent to the Custom Ringback listing you wish to remove.
2. Click on the Delete button to immediately remove the custom callback list from the system and exit the *Edit* view.

Direct Call Pickup with Barge-In

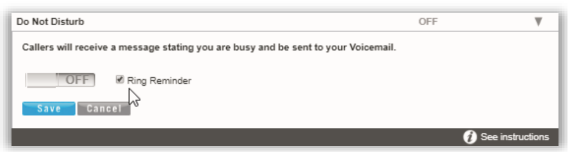
Dial into a call to another member of the group and if already answered, create a 3 way conference. Click on the adjacent drop drop-down ▼ arrow to access this feature's Edit view and enable the following options:



1. Barge-In Warning Tone: Click **On** to enable the tone
2. Automatic Target Selection: Click On to enable.
3. Click the Save button to submit the change and close the view.

Do Not Disturb

On | **Off** Setting. When Do Not Disturb is enabled, (ON) incoming callers receive a message stating that you are busy and can be sent to your Voicemail if that service is also turned ON. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

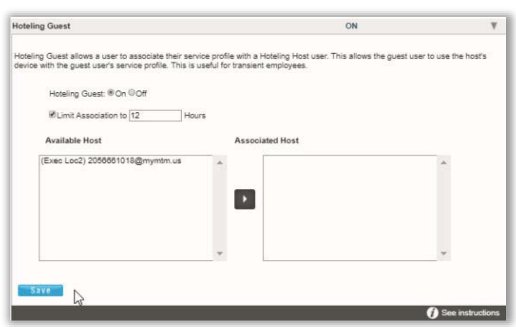


Manage Do Not Disturb

1. Click to toggle the switch to **On** or Off, as desired.
2. Ring Reminder: Click to place a check in the box ☑ if you wish to be reminded that DND is enabled.
3. Click the Save button to submit the change and exit the *Edit* view.

Hoteling Guest

The Hoteling Guest feature allows a user to associate their account profile with a Hoteling Host user's device/number, which means the Hoteling Guest user can utilize the Hoteling Host's device as though it is their own device/extension for a period of time. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

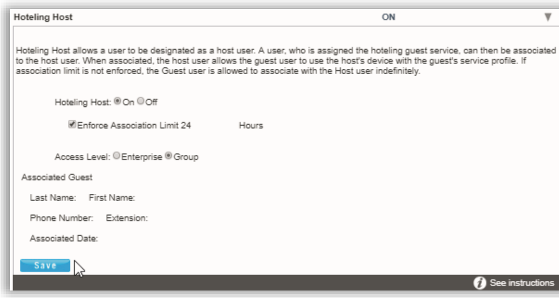


Manage Hoteling Guest

1. Click within a radial button to set Hoteling Guest to **On** or **Off**.
2. Limit Association to x Hours: Click to place a check mark to enable and then enter the number of Hours.
3. Highlight an Available Host number and use the arrow ▶ to move it to the Associated Host section to select it.
4. Click the Save button to submit the change and exit the *Edit* view.

Hoteling Host

The Hoteling Host service allows a user account/ device to be designated as a *Host*. A user who is already setup as a Hoteling Guest can then select the Hoteling Host. When the two are associated, the Host allows the Guest to use the host's device with the guest's service profile (as though it is their own device/ extension) for a period of time. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.



Manage Hoteling Host

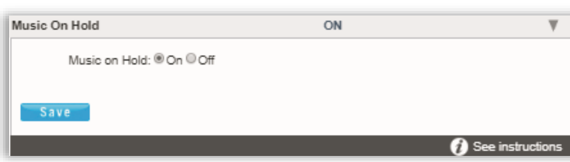
1. Hoteling Host: Click within a radial button to set to **On** ⦿ or **Off** ○ (default).
2. Enforce Association Limit 24 Hours: Click to place a checkmark in the box ☑ to enable the limitation. If the Association limit (24hrs) is not enforced, the Guest user is allowed to associate with the Host user's device indefinitely.
3. Access Level: Click to select ⦿ *Enterprise* or ⦿ *Group*.
4. Associated Guest: Enter the requested information (Last Name, First Name, Phone Number, Extension,and the Associated Date).
5. Click Save to submit and close the *Edit* view.

Music On Hold

On | Off feature. The Music On Hold feature may also be available to manage from the Basic Features card on your Dashboard/Home Page. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Manage Music On Hold

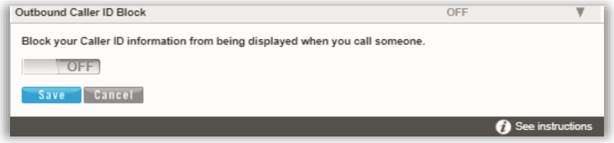
1. Click within the appropriate radial button to turn **On** ⦿ or **Off** ○ (default).
2. Click the Save button to submit the change and close the view.



Outbound Caller ID Block

On | Off feature. When enabled, the Outbound Caller ID Block feature allows you to block your Caller ID information from being displayed when you call someone. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

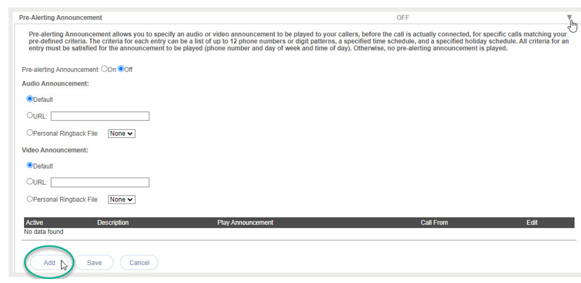
Manage Outbound Caller ID Block



1. Click within the appropriate radial button to turn **On** ⦿ or **Off** ○ (default).
2. Click the Save button to submit the change andclose the *Edit* view.

Pre-Alerting Announcement

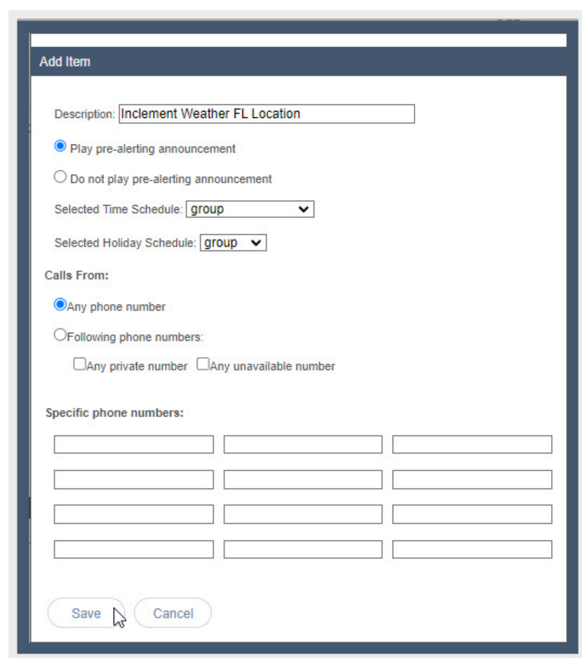
The Pre-Alerting Announcement feature allows a user to play a file (audio or video) to all callers before the call is actually connected. Criteria for specific callers, times, etc. can be defined. It can be turned ON/OFF, as needed. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.



Manage Pre-Alerting Announcement Usage

1. Define or select the following, as needed:

   Pre-Alerting Announcement: On Off - Click within the appropriate radio button to enable/disable Pre-Alerting Announcement usage.

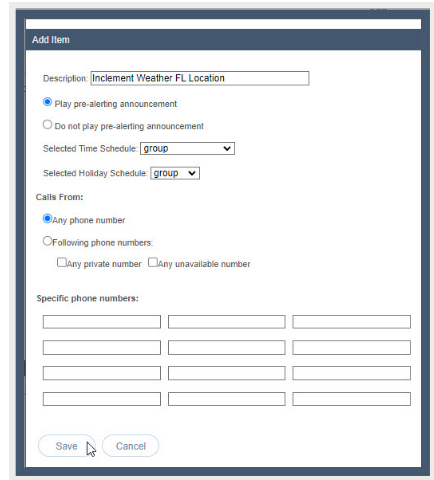


2. Choose an Audio or a Video Announcement file to use:

   - Default: use the group default announcement
   - URL: type the full URL where the file is stored
   - Personal Ringback File: select from any available file options within the drop-down tool.

3. Click on the Save button to save your basic *Pre-Alerting Announcement setup*.

Add a Pre-Alerting Announcement



1. Click on the *Add* button to open the Add Item dialog.
2. Description: Type a short title (E.g., Priority 1, Low Priority, etc.) for this announcement.
3. Select, from the following options, as needed:
   - Play pre-alerting announcement - Click to enable ⦿.
   - Do not play pre-alerting announcement - click to disable ⦿.
   - Selected Time Schedule: Choose an option from the drop-down menu. **or…**
   - Selected Holiday Schedule: Choose an option from the drop-down menu. Note: *Only* <u>*one*</u> *schedule type (Time or Holiday) may be selected for a Pre-Alerting Announcement.*
   - Any Phone Number – click to enable ⦿/disable○.
   - Following Phone Numbers – click to enable ⦿/disable○.
   - Any Private Number – enable ⦿/disable○.
   - Any Unavailable Number – click to enable ⦿/disable○.
   - Specific Phone Numbers – enter up to 12 (twelve) 10-digit numbers that will be included to receive the announcement when they call this number.
4. Click on the Save button to submit the new *Pre-Alerting Announcement* and return to Settings.

Activate/Deactivate Pre-Alerting Announcement

1. Click to choose ON or OFF and click Save.

Edit or Delete a Pre-Alerting Announcement

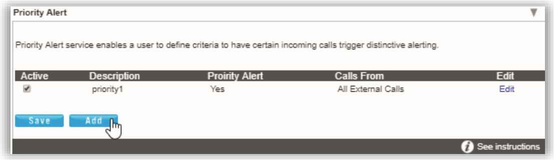
1. Click on the Edit link next to the appropriate Pre-Alerting Announcement listing to open the *Edit Item* dialog to make changes.

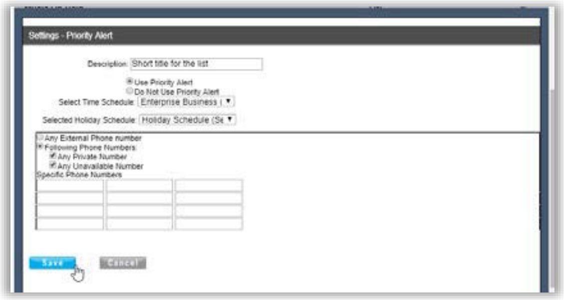
2. Modify the settings, schedules, or numbers, as needed, and click Save to update

   OR click Delete to remove the Pre-Alerting Announcement from the list available to you for use.

Priority Alert

The Priority Alert feature allows a user to define criteria that triggers distinctive alerts for specific incoming calls. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.





Add a Priority Alert

1. Click on the *Add* button to open the criteria dialog.
2. Description: Type a short title (E.g., Priority 1, Low Priority, etc.) for this alert.
3. Select, set, or define the following options, as needed:
   - Use Priority Alert – Click the radial button to ⦿ enable or /disable○.
   - Do Not Use Priority Alert – click to enable ⦿/disable○.
   - Selected Time Schedule: Choose an option from the drop-down menu, **or…**
   - Selected Holiday Schedule: Choose an option from the drop-down menu.
     Note: *Only one schedule type (Time or Holiday) may be selected for each Priority Alert.*
   - Any External Phone Number – click to enable ⦿/disable○.
   - Following Phone Numbers – click to enable ⦿/disable○.
   - Any Private Number – enable ⦿/disable○.
   - Any Unavailable Number – click to enable ⦿/disable○.
   - Specific Phone Numbers – enter up to 12 (twelve) 10-digit numbers that will be included for the alert.
4. Click on the Save button to submit the new *Priority Alert* and return to Settings.

Activate a Priority Alert

1. Click to place a check mark ☑ in the Active box next to a Priority Alert listing to activate it.

Edit a Priority Alert

1. Click on the Edit link next to the appropriate Priority Alert listing to open the *Criteria* dialog for editing.
2. Make changes to the settings, schedules, or numbers, as needed, and click Save to update.

Delete a Priority Alert

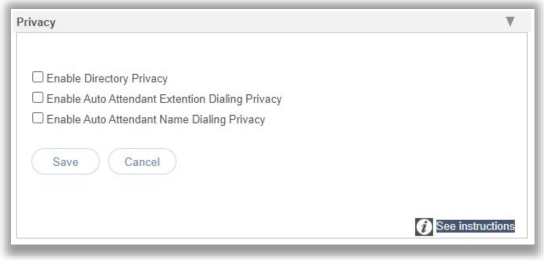
1. Click on the Edit link next to the appropriate Priority Alert listing to open its *Edit* view.
2. Click on the Delete button to remove the Priority Alert from the system.
   Wait for the Deleted Successfully! *message.*
3. Close the dialog to return focus the *Priority Alert* list and click on the Save button to update and exit.

Privacy

The Privacy feature allows you to define your name and number privacy settings for Directories, Auto Attendants, and Hunt Groups.
Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Manage Privacy

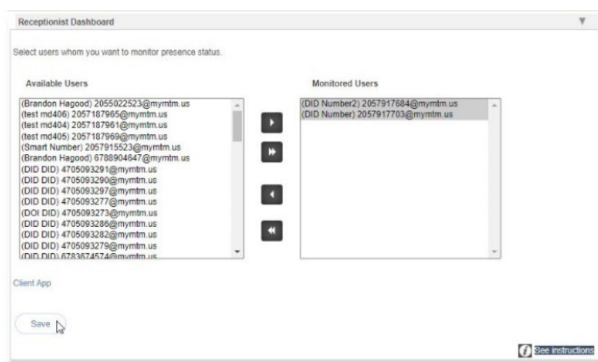
1. Click to enable ☑ or disable ☐ the following options, as needed:



   - Enable Directory Privacy - when enabled, removes the the name/number from group/enterprise directories.
   - Enable Auto Attendant Extension Dialing Privacy - when enabled, removes extension/ number from Auto Attendant extension dialing.
   - Enable Auto Attendant Name Dialing Privacy - when enabled, removes the Name from Auto Attendant name dialing.
2. Click the Save button to update the system with the new information and close the *Edit* view.

Receptionist Dashboard

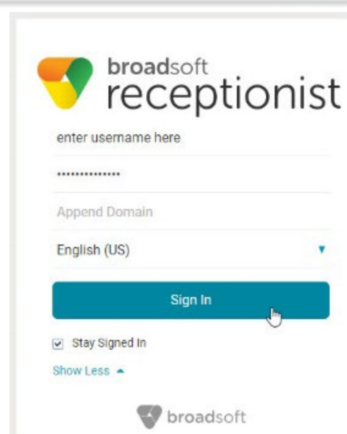
This feature allows the user assigned to the Broadsoft Receptionist Client to select other users in their organization whom they wish to monitor for presence status within the Receptionist Dashboard client.



Monitor Users in Receptionist Dashboard

To select users to monitor within the application:

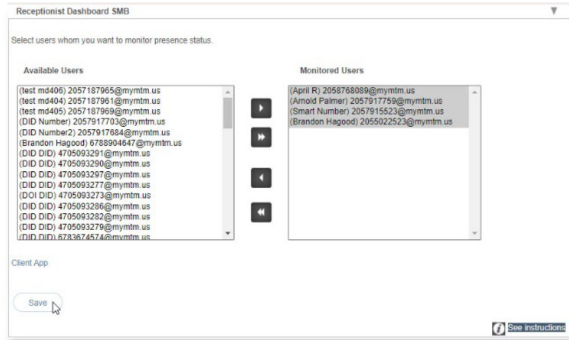
1. Select from the listed lines in the **Available Users** section and use the arrow tools to move them to the **Monitored Users** section.
2. Click Save when finished to submit changes and close the dialog.



Quick Access to the Receptionist Dashboard

1. Click on the Client App link to open the sign in page for the Broadsoft Receptionist client application in a new browser window.

Receptionist Dashboard SMB

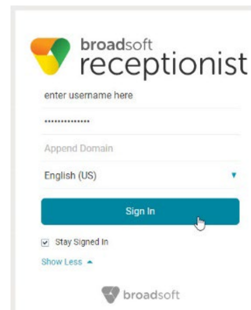


This feature allows the user assigned to the Broadsoft Receptionist SMB client application to select other users in their organization whom they wish to monitor for presence status within the Receptionist Dashboard application.

Monitor Users in Receptionist Dashboard SMB

To select users to monitor within the application:

1. Select from the listed lines in the **Available Users** section and use the arrow tools to move them to the **Monitored Users** section.
2. Click Save when finished to submit changes and close the dialog.

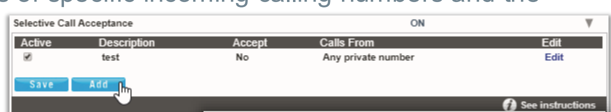


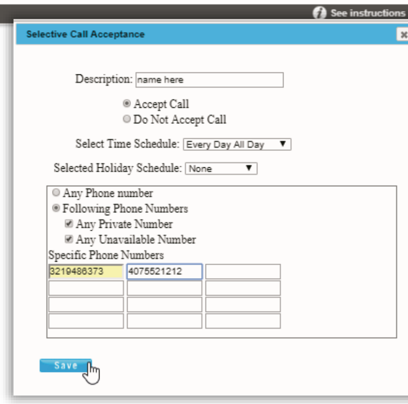
Quick Access to the Receptionist Dashboard SMB

1. Click on the Client App link to open the sign in page for the Broadsoft Receptionist SMB client application in a new browser window.

Selective Call Acceptance

Selective Call Acceptance allows the user to create lists of specific incoming calling numbers and the criteria for acceptance (or Non-acceptance).
Click the adjacent drop-down arrow ► to access this feature's *Edit* view.





Add a Selective Call Acceptance List

1. Click on the Add button to open the criteria view.
2. Define the following criteria options, as needed:
   - Description – Required: A short descriptive title for this call block type.
   - Accept Call – Click to setup this list to accept specific calls when all the criteria defined here are met.
   - Do Not Accept Call – Click to setup this list to Block Calls specific calls when all criteria defined here are met.
   - Select Time Schedule – Choose a pre-defined Time Schedule from the drop-down menu. **OR**...
   - Selected Holiday Schedule – Choose a pre-defined Holiday Schedule from the drop-down menu. Note: *Only one schedule type (Time or Holiday) can be selected at a time.*
   - Any Number – Select if any number dialed in will be accepted or blocked.
   - Following Phone Numbers – Select to define individual numbers to accept or block.
   - Any Private Number – Select to trigger for incoming calls with "Private" Caller ID.
   - Any Unavailable Number – Select to trigger for incoming calls with "Unavailable" Caller ID.
   - Specific Phone Numbers – Select and enter up to twelve (12) 10-digit phone numbers.
3. Click the Save button when finished to submit the changes and close the *Edit* view.

Edit a Selective Call Acceptance List

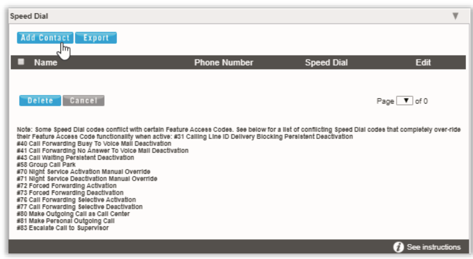
1. Click on the Edit link next to the appropriate Selective Call Acceptance listing to open the item's *Edit* view.
2. Make changes to the settings, schedules, or numbers - as needed.
3. Click on the Save button to update the Priority Alert information.

Delete a Selective Call Acceptance List

1. Click on the Edit link next to the appropriate listing.
2. Click on the Delete button and wait for the Deleted Successfully! message.
3. Click on the ☒ Exit icon to return to the list.
4. Click on the Save button to update the information and return to Settings.

Speed Dial

This feature allows users to define Speed Dial options for specific numbers using short 2 digit codes (00-99) prefixed by the # sign. Some 2-digit code combinations will conflict with Calling Feature (Star) Codes. These Star Codes are listed to assist the user. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.



Add a Speed Dial Contact

1. Click on Add Contact.
2. Enter First Name and Last Name.
3. Enter at least one (1) Phone Number (10 digits, no spaces or special characters) in the appropriate field (Home, Work, Mobile)
4. Primary Phone: Select the type using the drop-down menu (Home, Work, or Mobile)
5. Select from the available (unused) list of Speed Dial Codes using the drop-down menu (00-99). (Check the Star Codes listed for you to ensure there are no conflicts)
6. Click the Save button to submit the new Speed Dial Code and close the *Edit* view.

Edit a Speed Dial Contact

1. Click Edit next to a Speed Dial Contact in the list.
2. Make changes to name, numbers, primary assignment, or code, as needed.
3. Click the Save button to submit the change and close the view.

Delete a Speed Dial Contact

1. Click within the checkbox ☑ in the first column to select an item in the list.
2. Click on the Delete button below.

OR

1. Click the Edit link next to a Speed Dial Contact to open its Criteria dialog.
2. Click the Delete button.
3. Click the ☒ Exit icon to return to the *Edit* view.
4. Click Save to submit the changes and return to Settings.

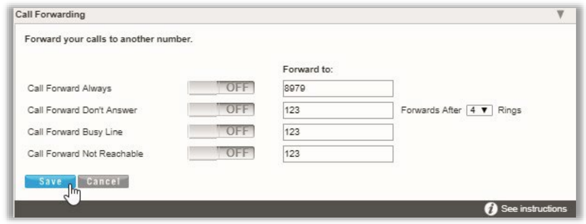
Export Speed Dial Contact List

1. Click on the Export button to automatically download a .csv format report containing the current list of Speed Dial Contacts which can be saved to a local folder or printed, as desired.

Call Forwarding

The Call Forwarding service allows users to set up simple forwarding numbers for specific purposes and set the service to work Always, when you Don't Answer, have a Busy Line, or when you're Not Reachable.
Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Set Call Forwarding Number(s)



1. Click the toggle next to the appropriate forwarding option(s) to turn ON or Off.
2. Enter the 10-digit number or extension (no spaces or special characters) in the adjacent Forward To: field for the option(s) selected.
3. Forward After x Rings: Use the drop-down menu to select the number of rings before a call is forwarded.
4. Click the Save button to submit the changes and close the *Edit* view.

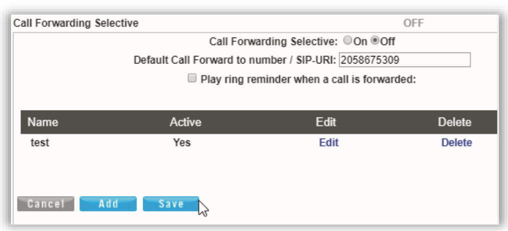
Edit Call Forwarding Numbers

1. Make changes as needed to forwarding numbers or enabled options.
2. Click the Save button to submit the change(s).

Delete Call Forwarding Numbers

1. Simply remove (erase) the number from the appropriate Call Forwarding type and click the Save button.

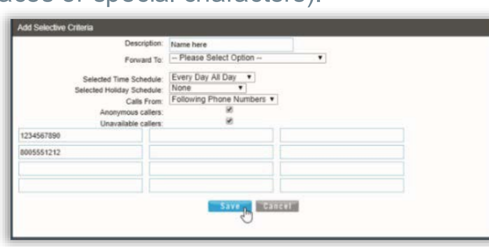
Call Forwarding Selective



The Call Forwarding Selective feature allows users to set up a default forwarding number, define very specific criteria that will trigger call forwarding, and receive a reminder when the feature is enabled. Note: All criteria defined must be met for this feature to work. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Add a Call Forwarding Selective List

1. Click within the radial button for ⦿ ON to enable or ○ Off to disable (default).
2. Enter the Default Call Forward To number (10-digits, no spaces or special characters).
3. Click within the check box ☑ to enable Play Ring reminder when a call is forwarded.
4. Click the Save button to update the system – this closes the view.
5. Reopen the Call Forwarding Selective *Edit* view.



6. Click the Add button to open the dialog further and define the selective forwarding trigger criteria.
7. Enter or select from the following:
   - Description: Type a short description or title for review in lists.
   - Forward To: Select an option from those you defined (see steps 1-4 above) using the drop-down menu.
   - Selected Time Schedule: Choose a Time Schedule using the drop-down menu. Selected Holiday Schedule: Choose a Holiday schedule using the drop-down menu. Note: *Only one schedule type (Time or Holiday) may be selected at a time.*
   - Calls From: Select an option using the drop-down menu (If *From Following Phone Numbers* is selected, enter up to twelve (12) 10-digit number(s) in the *From Following* fields provided below)
   - Click within the radial buttons ⦿ to include forwarding to the default number for Anonymous caller ID and/or Unavailable caller ID.
8. Click the Save button to submit the data and close the view.
   Optional: Repeat these steps to create multiple lists with alternative triggers or schedules.

Edit a Call Forwarding Selective List

Editing options found within the Call Forwarding Selective *Edit* view:

A. Turn On/Off: Click within the radial button for ON to enable or Off to disable (default) and Save.
B. Change Default Call Forward Number: Type a new 10-digit phone number in the field provided and Save.
C. Ring Reminder: Click within the Play ring reminder… check box to enable ☑ / disable ☐ and Save.
D. Edit the Forwarding Trigger Criteria:
   1. Click on the Edit link next to the desired listing to open the *Call Forwarding Selective Criteria* dialog.
   2. Make changes to the trigger criteria (Description, Schedules, and/or specified numbers to forward),as needed.
   3. Click the Save button to submit the changes and close the view.

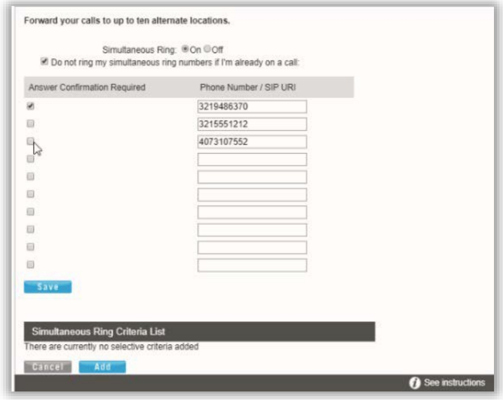
Delete a Call Forwarding Selective List

Caution: This action is immediate and cannot be undone.

1. Click on the Delete link next to the desired listing to instantly remove the selected listing.

Find Me – Simultaneous Ring

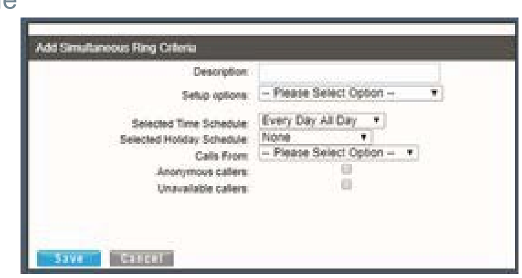
The Find Me – Simultaneous Ring service makes it easy to ensure you don't miss a call. It allows users to define up to ten (10) alternate phone numbers/ SIP URI addresses to ring when a call comes through and create multiple scenarios to use when the service is *On*.
All numbers defined here ring at the same time if they are enabled for usage. Click the adjacent drop-down arrow ▶ under View/Edit to access this feature's *Edit* view.



Setup Find Me – Simultaneous Ring Numbers

1. Click within the appropriate radial button to turn ON ⦿ or Off ○ (default).
2. Do not ring my simultaneous ring numbers if I'm already on a call: Click to place a check in the box ☑ to enable this feature.
3. Phone Number / SIP URI: Enter up to ten (10) phone or SIP URI numbers in the fields provided.
4. Answer Confirmation Required: Click to place checkmarks in the box to enable this feature for a number.
5. Click the Save button when finished to save the data and close the view.

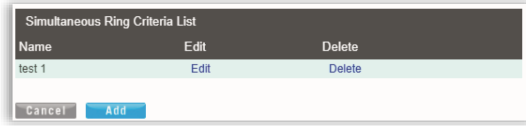
Setup Find Me – Simultaneous Ring Triggers



1. Click on the Add button beneath the number list to open the *Add Simultaneous Ring Criteria* list.
2. Description: (required) Type a short descriptive title for review in lists.
3. Define the following criteria options, as needed:
   - Setup Options: Use the drop-down menu to define whether this criteria list will use Simultaneous Ring or not.
   - Select Time Schedule: Choose a Time Schedule using the drop-down menu.
     OR
   - Selected Holiday Schedule: Choose a Holiday schedule using the drop-down menu. Note: *Only one schedule type (Time or Holiday) may be in use.*
   - Calls From: Use the drop-down menu to choose an option (and enter up to **12** 10-digit phone numbers in the fields provided below if *Following Phone Numbers* is selected).
   - Anonymous Callers: Click to add a check in the box ☑ to enable.
   - Unavailable Callers: Click to add a check in the box ☑ to enable.
4. Click on the Save button when finished to submit the criteria and close the view.

   Repeat to create additional criteria for different calling scenarios or schedules.

Edit Find Me – Simultaneous Ring



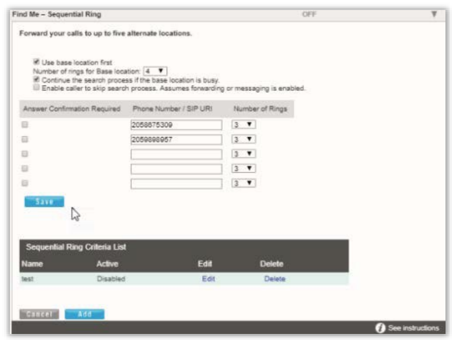
1. Make any changes to the Find Me settings.
2. Click the Edit link next to an item to modify the triggers.
3. Click the Save button(s) to submit the changes.

Delete Find Me – Simultaneous Ring

Caution: This action is immediate and cannot be undone.

1. Click the Delete link next to an item in the *Simultaneous Ring Criteria List* section to remove the selection.
2. Click the Save button to update the list information and return to Settings when finished.

Find Me – Sequential Ring



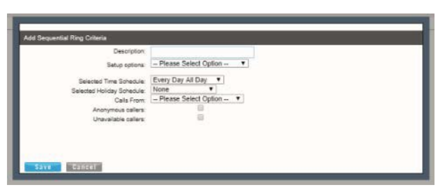
The Find Me – Sequential Ring service allows the user to define and manage up to five (5) alternate phone numbers that can be set to ring one after the other based on specific criteria if an incoming call is not answered. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Setup Find Me – Sequential Ring

1. Define the following basic setup options, as needed:
   - Use base location first: Click to turn On ☑ or Off ☐ (default).
   - Number of rings for Base location: Use the drop-down menu to select a number of rings.
   - Continue the search process if the base location is busy: Click within the check box to turn On ☑ or Off ☒ (default) to allow forwarding even when the base number is busy.
   - Enable caller to skip process: Click within the check box to turn On ☑ or Off ☐ (default).
2. Define the setup for the numbers that will be used for forwarding (in the order of their use):
   - Answer Confirmation Required: Click to place a check in the box to enable this.
   - Phone Number / SIP URI: Type a 10-digit number (no spaces or special characters) in the field(s) provided.
   - Number of Rings: Use the drop-down selection tool to choose a number of rings before trying the next number in the list (below).
3. Click the Save button to submit the changes and return to Settings.

Setup Find Me – Sequential Ring Triggers

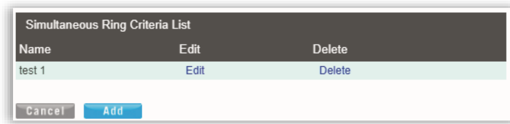
1. Click on the Add button beneath the number list to open the *Add Sequential Ring Criteria* dialog.
2. Add a Description: (required) Type a short descriptive title for review in lists.
3. Enter or select from the following trigger options, as needed:
   - Setup Options: Use the drop-down menu to define whether this list will use Sequential Ring.



- Select Time Schedule: Select a Time Schedule using the drop-down menu.
  OR
- Selected Holiday Schedule: Choose a Holiday schedule from the drop-down menu.
  Note: *Only one schedule type can be used at a time when defining a set of criteria.*
- Calls From: Use the drop-down menu to choose an option (and enter phone numbers in the fields provided below if ***Following Phone Numbers*** is selected).
- Anonymous Callers: Click to add a check in the box ☑ to enable.
- Unavailable Callers: Click to add a check in the box ☑ to enable.

4. Click on the Save button when finished to submit the trigger criteria and return to Settings.

Edit Find Me – Sequential Ring



1. Make changes to numbers or Answer Confirmation settings, as needed.
2. Click the Edit link next to a list item and make changes to the trigger criteria, as needed.
3. Click the Save button to update the information when finished.

Delete Find Me – Sequential Ring

Caution: This action is immediate and cannot be undone.

1. Click the Delete link next to a list item.
2. Click the Save button to update the list and return to Settings.

Push to Talk

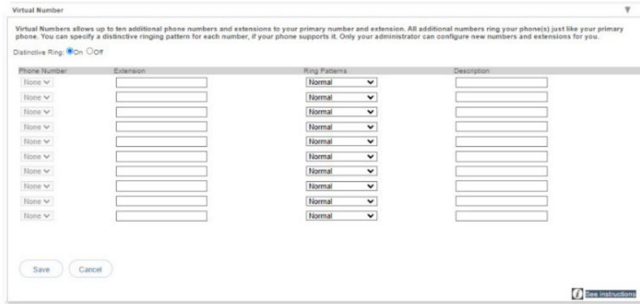
The Push to Talk feature allows specific calls to be answered automatically via the speakerphone/ intercom function on the device. Users can define which numbers/callers within the directory will have *Push to Talk* access when calling you. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Push To Talk

1. Define the following options, as needed:
   - Auto Answer: Click to place a check in the box to automatically answer *Push to Talk* calls via speakerphone / intercom.
   - Outgoing Connection Type: Click within the radial buttons to select the appropriate connection type.
     - One Way: The originator can talk to the party receiving the call, but the receiver cannot respond.
     - Two Way: The originator and receiver can talk to each other.
   - Access Lists: Click within the radial button to select the appropriate option:
     - Allow Calls from Selected Users: Select users to allow below.
     - Allow Calls From Everyone Except Selected Users: Select users to disallow below.
   - Available Users: Highlight and use the arrows ⏵⏴ to move users to move selection(s) to and from the *Selected Users* section.
2. Click on the Save button to submit the changes and return to Settings when finished.

Virtual Number

Note: The Virtual Number feature requires an Administrator to have configured new numbers and extensions for use. The setting dialog allows a user to define up to ten (10) additional phone numbers and extensions to ring along with your primary number and extension. All additional numbers ring your phone(s) just like your primary phone. The user can specify a distinctive ringing pattern for each number if the phone device supports it. Only an administrator can configure new numbers and extensions for your virtual number. If virtual numbers are in use and you do not have additional virtual numbers available for selection in this dialog, contact your Administrator for assistance.

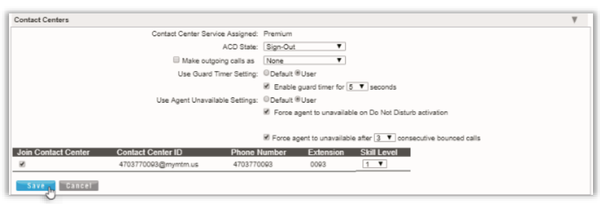


Click the adjacent drop-down arrow ► to access the *Edit* dialog view.

1. Select and or enter information for the following, as needed:
2. Distinctive Ring: Click to turn the distinctive ring capability for the numbers/extensions defined below ⦿ On or ○ Off.
   - Phone Number: Select a pre-defined option from the drop-down menu as needed to define the ring for an extension/number.
   - Extension: Type the correct extension in the field provided for each line (as needed).
   - Ring Patterns: Choose an available ring pattern from the drop-down menu, as needed.
   - Description: Type a short description in this field to assist with future edits/changes.
3. Click on the Save button to submit the new information and return to the *Settings* list view.

Contact Centers

The settings for Contact Centers are generally pre-defined by an Admin during the installation and implementation of a Contact Center, or upon the addition of new users. However, some Supervisors or Managers may receive additional access to modify limited settings used in conjunction with the Contact Center features within their individual accounts. Remember, these personal account settings do not override the Enterprise Contact Center Agent or Supervisor settings.
The adjacent drop-down arrow ► opens this feature's *Edit* view.

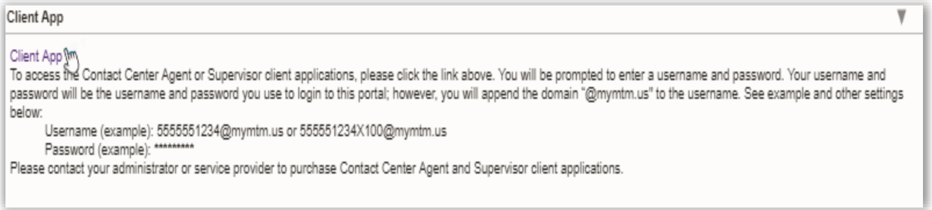


Manage Contact Center Settings

1. Define the following options, as needed:
   - ACD State: Select an option from the drop-down menu.
   - Make outgoing calls as: Click to enable and select the appropriate menu option.
   - Use Guard Timer Setting: Click to select for either Default or User.
   - Enable guard timer: Click ☑ to enable and select the appropriate number of *Seconds* using the drop-down menu.
   - Use Agent Unavailable Settings: Click to select either Default or User settings.
   - Click ☑ to enable/ ☐ disable Force agent to unavailable on Do Not Disturb activation.
   - Click ☑ to enable/ ☐ disable Force agent to unavailable after X consecutive bounced calls and specify the number.
   - Click ☑ under Join Contact Center to enable your account for contact center usage.
   - Select an alternate Skill Level using the available drop-down menu options.
2. Click the Save button when finished to submit the changes and close the view.

Client App

The Client App feature in the *Settings* page provides authorized users with an access point for the Contact Center or Supervisor client application sign in page. Instructions are provided in the *Edit* view.



Supervisor

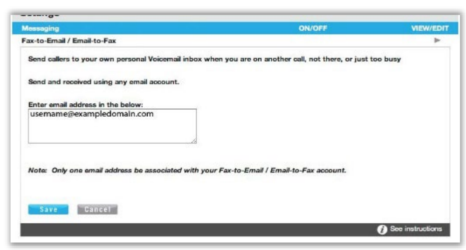
The Supervisor feature in the *Settings* page offers authorized users the ability to manage their Contact Center agent assignments. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Supervisor Settings

1. Click on the Edit link to view the Agent assignment options.
2. Highlight the agents you wish to select and use the ⏵ ⏴ arrows to move Available Agents to Assigned Agents or vice versa.
3. Click the Save button when the changes are complete to update the system and close the *Edit* view.

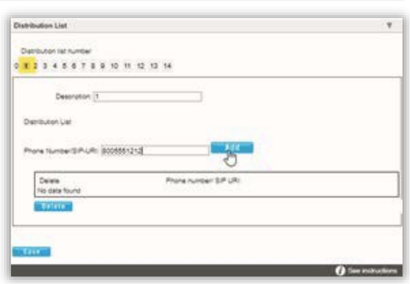
Fax-to-Email / Email-to-Fax

1. Click on the Edit link to view the setting options.
2. Enter email address below: Enter the email address to use for Fax.
3. Click the Save button when the changes are complete to update thesystem and close the *Edit* view.



Distribution List

The Distribution List feature allows the user to create one or more messaging distribution lists (up to 14) that will send Voicemail notifications using the portal setup when new messages are left on voicemail. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

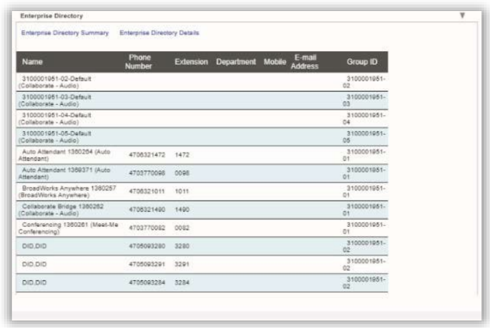


Manage Distribution List

1. Click to select a Distribution List Number from the options at the top.
2. Enter the Description (name).
3. Type the Phone Number/Ext (10-digits; no spaces or special characters).
4. Click the Add button and click Save to submit the data and exit.

Enterprise Directory

The Enterprise Directory feature offers an online listing of all phone service information within the Enterprise directory for theaccount. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.


Enterprise Directory

Enterprise Directory Summary Enterprise Directory Details

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 1360264 (Auto Attendant)	4706321472	1472				3100001951-01
Auto Attendant 1369371 (Auto Attendant)	4703770098	0098				3100001951-01
BroadWorks Anywhere 1360257 (BroadWorks Anywhere)	4706321011	1011				3100001951-01
Collaborate Bridge 1360262 (Collaborate - Audio)	4706321490	1490				3100001951-01
Conferencing 1360261 (Meet-Me Conferencing)	4703770092	0092				3100001951-01
DID,DID	4705093280	3280				3100001951-02
DID,DID	4705093291	3291				3100001951-02
DID,DID	4705093284	3284				3100001951-02

Print Enterprise Directory Summary

1. Click on the Enterprise Directory Summary Link to view a summary listing of the Phone List to print using your browser feature.

Print Enterprise Directory Details

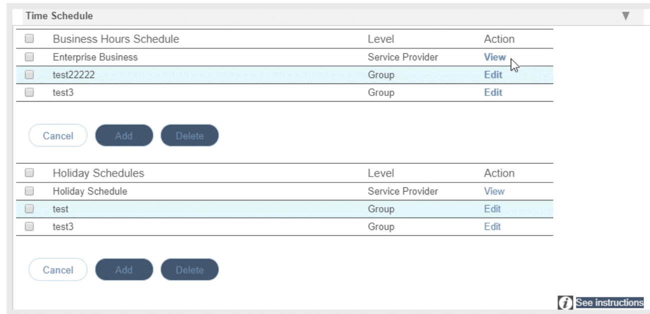
1. Click on the Enterprise Directory Details link to view a detailed phone list that is ready to print using your browser features.

Time Schedule

The Time Schedule feature allows users to schedule call behaviors (send to voicemail, etc.).
Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add a Schedule

1. Click to place a check mark ☑ next to Business Hours or Holiday Schedule.
2. Click the Add button for that option.
3. Enter a unique Schedule Name.
4. Click the Save button when finished.



View a Schedule

Some schedules are read-only in this view. Simply click View to review the schedule's current setup.

Delete a Schedule

Use caution. This action removes the schedule <u>and</u> any underlying events 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 remove the Schedule <u>and</u> any events within it.

Add a Time Schedule Event

1. Click to place a checkmark ☑ next to the preferred schedule option (Business Hours or Holiday).
2. Click Add Event.
3. Event Name – Type a short title for review in lists.
4. Define the following <u>as needed</u> for a specific event type:
   - Start Date – select the date the event begins.
   - Select the All Day Event checkbox ☑, OR define the following:
   - Start Time, End Time, and/or End Date
   - Recurs – Select from 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 – Select from *Never*, *After (x # of occurrences)*, or *Date* (and set the end date).
   - Announcement Start and Announcement End - Optional.
     Select a Start announcement from the drop-down list to use at the beginning of the period defined forthe event. Select an End Announcement from the drop-down list to play when the event is slated to stop.
     Note: An announcement defined for the End *<u>may</u>* play to callers if an announcement/prompt is not defined for regular hours, none is specified at the start of the next event, or if there are no other schedules with events that have prompts/announcements that will trigger to play at the time this event is slated to end.

Note: *This specialized and optional feature is only for use in Holiday Schedules and in tandem with the location/group level Auto-Attendant Tree features. It is not for use with personal Business Hours schedules. Start and End announcements may be used with AA tree holiday prompt schedules in events that run during 1 single day (within the hours of 12:00am-11:59pm in one 24 hour period).The Start and End announcements are not optimized for use in any other schedules, events set to be recurring, or for events that span multiple days and/or that are defined to cross the midnight hour.*

See also: Announcement Repository.

5. Click Save when finished to submit the data and return to Settings.

Edit a Time Schedule Event

1. Click on the Edit link 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 to submit the changes and close the view.

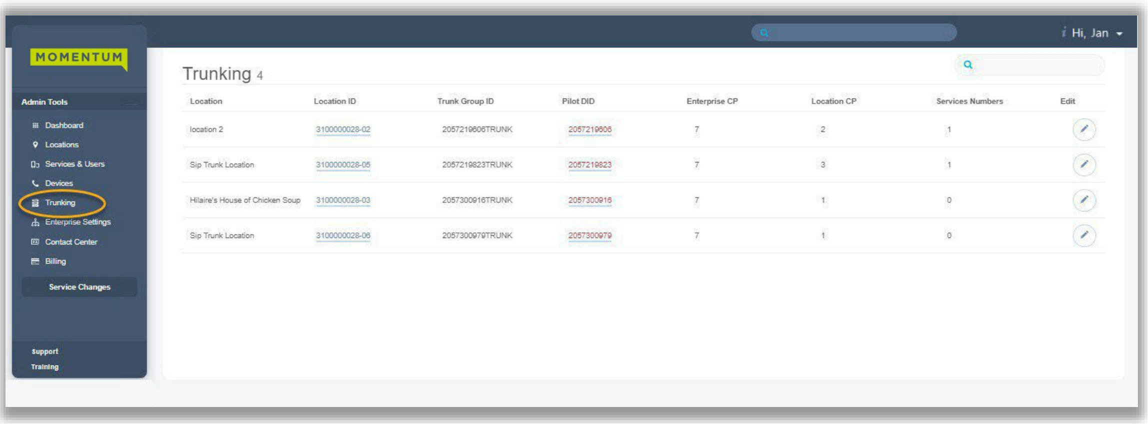
Delete a Time Schedule Event

Use caution. This action immediately removes the event and cannot be undone.

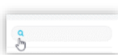
1. Click within the checkbox ☑ adjacent to a Schedule to select it.
2. Click the Edit link next to the selected item to review the Schedule's events.
3. Click within the checkbox ☑ adjacent to an *Event* listing to select it.
4. Click on the Delete Event button.
5. Click on the Save button to refresh the Schedule data and exit.

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.



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.

Edit

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

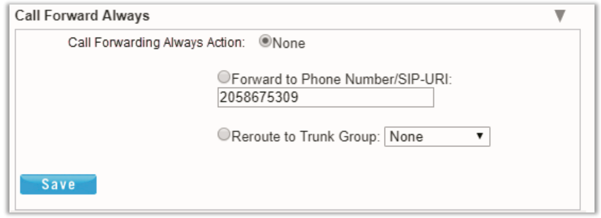
Click on the Edit icon  adjacent to the Trunk Group listing (far right column) to open the *Trunk Group Features* page and manage the call forwarding settings and usage.

General settings might include any features defined for organizational use. For Example:

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

Call Forward Always

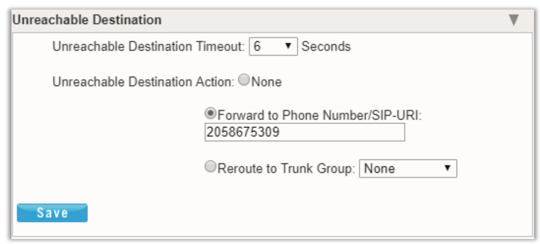
This feature defines the overall behavior of Forwarding and Routing for the SIP Trunk. The default action for *Call Forwarding Always* is **None**.



1. Click on the arrow ▶ under the View/Edit column to open the *Edit* view for this service.
2. 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.
3. 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.

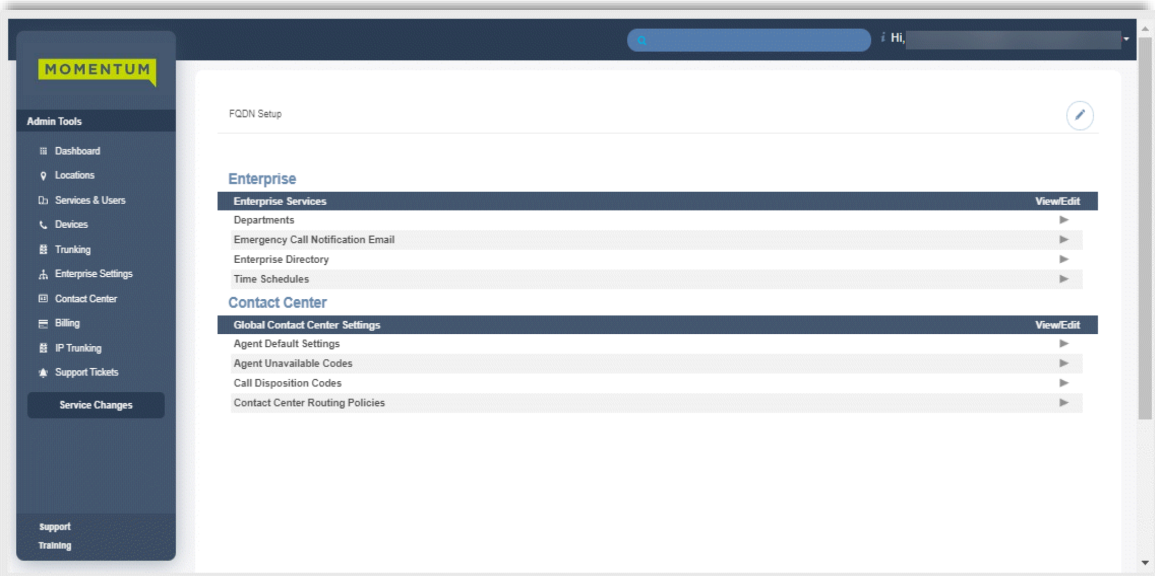


1. Click on the arrow ▶ under the View/Edit column next to a feature to open its *Edit* view.
2. Click to enable one of the following alternate options, as needed:
   - Forward to Phone Number/SIP-URI: and enter the 10- digit number (no spaces or special characters).
   - Reroute to Trunk Group and select the group using the drop-down menu.
3. Click the Save button when finished to submit the data and close the settings dialog.

Note: Any Trunk Group settings are made available for administration per organizational requirements. For more maintenance instructions, refer to the sections in this guide that describe these other features.

ENTERPRISE SETTINGS

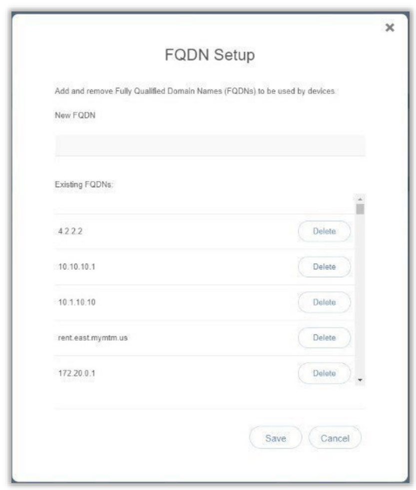
The Enterprise Settings menu option opens that section for review and administration of the global feature settings. In this section simply click on an ▶ arrow under the View/Edit column adjacent to the desired Enterprise Service or the Contact Center feature to view the *Edit* dialog and manage the settings.



Enterprise FQDN Setup

Manage the default Fully Qualified Domain Names (FQDNs) to be used by the Enterprise's devices that are in inventory on the account. Any FQDNs that are defined here may be assigned to devices at the Location or group level, as well as individual devices. See: Devices.

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. Any 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 update the system and close the dialog.

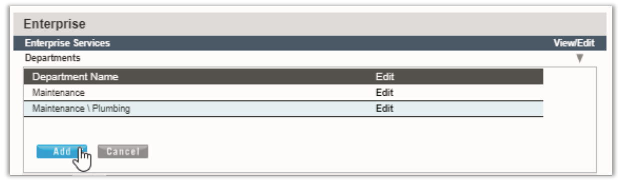
Enterprise Departments

Super Admin-level access to manage departments for the entire organization.

Add a Department

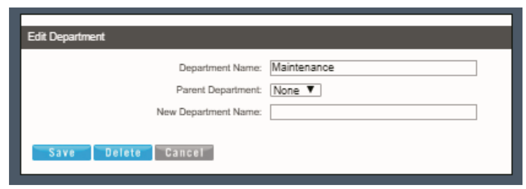
In the **Departments** edit view:

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

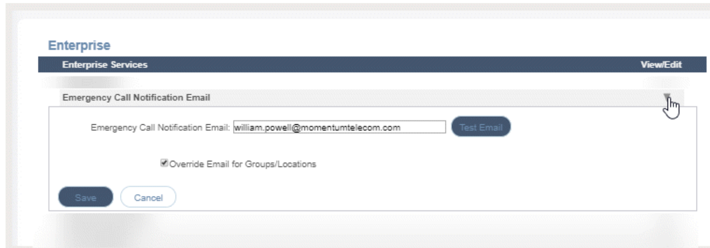
1. Click on the Edit link next to a department.
2. Click the Delete button to remove the selected department and return to Enterprise Settings.

Enterprise 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 also: Locations & Groups - 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 dial 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 Directory

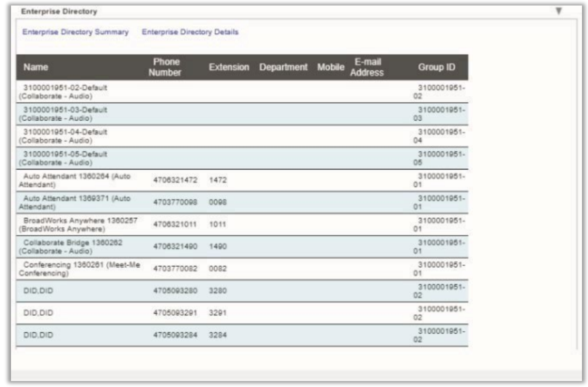
The Enterprise Directory feature offers an online listing of all phone service information within the Enterprise directory for the account.

Print Enterprise Directory Summary

1. Click on the Enterprise Directory Summary Link to view a summary listing of the Phone List to print using your browser feature.

Print Enterprise Directory Details

1. Click on the Enterprise Directory Details link to view a detailed Phone List that is ready to print using your browser feature.


Enterprise Directory

Enterprise Directory Summary   Enterprise Directory Details

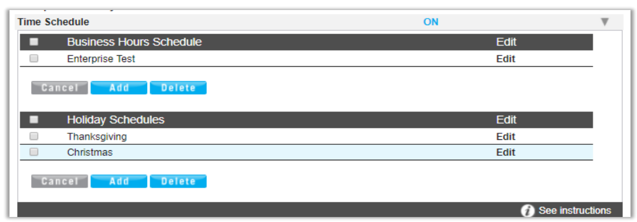
Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID
3100001951-02-Default (Collaborate - Audio)						3100001951-02
3100001951-03-Default (Collaborate - Audio)						3100001951-03
3100001951-04-Default (Collaborate - Audio)						3100001951-04
3100001951-05-Default (Collaborate - Audio)						3100001951-05
Auto Attendant 1360264 (Auto Attendant)	4706321472	1472				3100001951-01
Auto Attendant 1369371 (Auto Attendant)	4703770098	0098				3100001951-01
BroadWorks Anywhere 1360257 (BroadWorks Anywhere)	4706321011	1011				3100001951-01
Collaborate Bridge 1360262 (Collaborate - Audio)	4706321490	1490				3100001951-01
Conferencing 1360261 (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 Time Schedules

The Enterprise Time Schedule feature allows Admins to setup and manage the global business or holiday schedules that users can select for features that modify call behaviors, like Call Forwarding and Call Forwarding Selective.

Add a Schedule

1. Click to place a check mark 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 check box ☑ 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. This will affect any features that have selected this Schedule to trigger call behaviors (for example: Call Forwarding, Call Forwarding Selective, etc.)

Add an Event

1. Click to place a check mark ☑ 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.
   - Select the All Day Event check box ☑, OR define the Start Time, End Time, and/or End Date
   - 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.

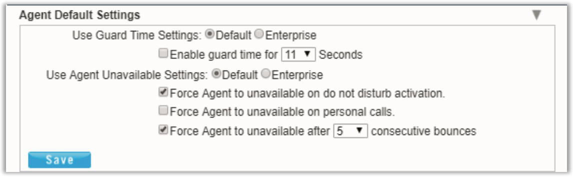
1. Click within the check box ☑ adjacent to a Schedule to select it.
2. Click the Edit option to view the Time Schedule Edit dialog and the list of Events.
3. Click within the check box ☑ adjacent to an Event to select it.
4. Click on the Delete Event button.
5. Click on the Save button to update the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

1. 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.



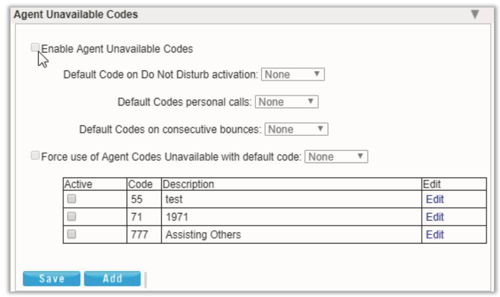
   - Use Agent Unavailable Settings: Click within the radial button to enable either ⦿ Default or ⦿ Enterprise.
   - Click within the box ☑ to enable Force Agent to unavailable on do not disturb activation.
   - Click within the box ☑ to Force Agent to unavailable on personal calls.
   - Click within the box ☑ to Force Agent to unavailable after x consecutive bounces and specify the number of bounces using the drop-down menu.
2. Click the Save button when settings are defined to submit the changes and close the dialog.

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 open its *Edit* view.

Enable Agent Unavailable Codes

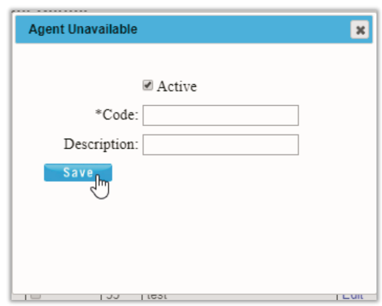
1. Select and define the following settings, as needed:
   - Click within the box ☑ to Enable Agent Unavailable Codes.
   - Choose the Default Code on Do Not Disturb using the drop-down menu.
   - Choose the Default Codes personal calls using the drop-down menu.
   - Choose the Default Codes on consecutive bounces using the drop-down menu.
   - Click within the box ☑ to enable Force use of Agent Codes Unavailable with default code and select a code using the drop-down menu.

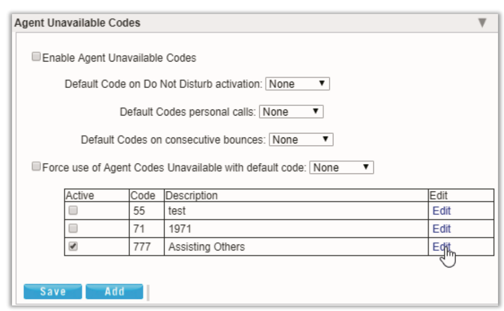


2. Click the Save button to submit the data and close the dialog.

Add Agent Unavailable Codes

1. Click on the Add button to begin adding a new code.
2. Click within the Active check box ☑ 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.



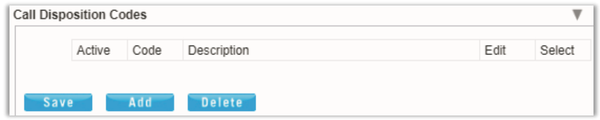


Edit Agent Unavailable Codes

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 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 check box 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

1. In the Call Disposition Codes *Edit* view, you may make the following changes:
   - Activate/Deactivate Call Disposition Codes: Click within the Active check box 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.
2. Click the Save button(s) to submit all changes and close dialogs.

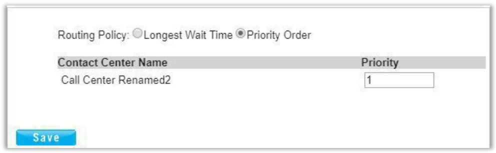
Delete Call Disposition Codes

Caution: This action is immediate and cannot be undone.

1. Click within the check box ☑ in the Select column next to a listed code.
   Example: Agent Unavailable Code.
2. Click on the Delete button to remove the code from the system.
3. 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 each of your organization’s Contact Center(s). Click on the arrow ► under the View/Edit column next to a feature to open its *Edit* view.

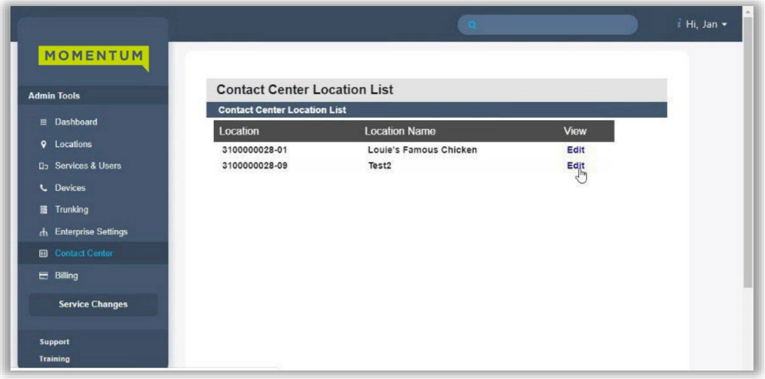


Manage Enterprise Contact Center Routing Policies

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

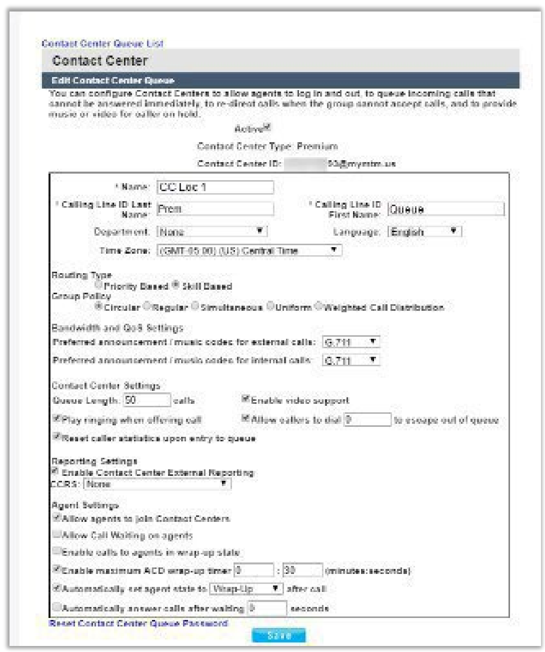
*Contact Center

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.



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

Group Policy section:

1. Define 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 check box to ☑ enable/ ☐ disable
   - Play Ringing when offering call: Click within the check box 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 check box 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

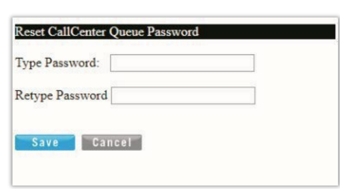
1. Select or define the following Reporting options, as needed:
   - Enable Contact Center External Reporting: Click within the check box to ☑ enable/ ☐ disable.
   - CCRs: Choose an option from the drop-down menu.
2. Click the Save button to submit all changes and close the dialog - or continue to the 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 check box to ☑ enable/ ☐ disable.
   - Allow Call Waiting on Agents: Click within the check box to ☑ enable/ ☐ disable.
   - Enable calls to agents in wrap-up state: Click within the check box to ☑ enable/ ☐ disable.
   - Enable maximum ACD wrap-up timer _MM_ : _SS_ : Type the ADC wrap-up time limit in Minutes and/or Seconds
   - Automatically set agent state to _____ after call: Click within the check box to ☑ enable/ ☐ disable.
2. Click the Save button to submit all changes and close the dialog.

Reset Contact Center Queue Password

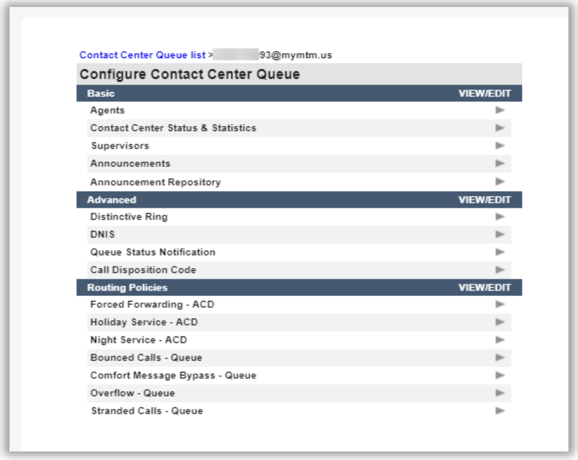
Manage the password for the Contact Center.



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 Queue 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.



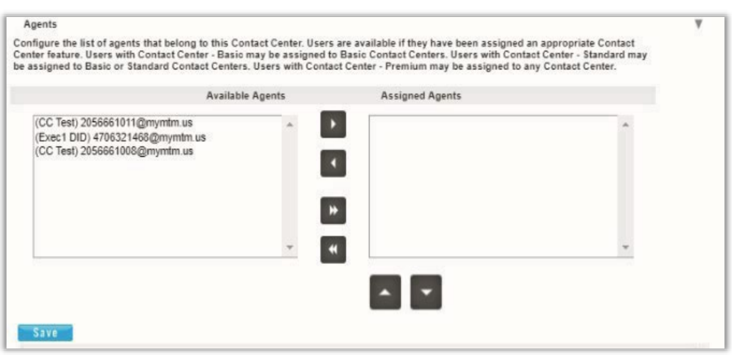
1. Click on the Configure link for a Contact Center listing to open the Configure Contact Center Queue dialog and review the features that may be administered.
2. Click on the arrow ▶ under the View/Edit column next to a feature to open its *Edit* view.

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 level.

- *Users with a* Contact Center - Basic *license may be assigned to Basic Contact Centers.*
- *Users with a* Contact Center - Standard *license may be assigned to Basic* or *Standard Contact Centers.*
- *Users with a* Contact Center - Premium *license may be assigned to* any *Contact Center.*

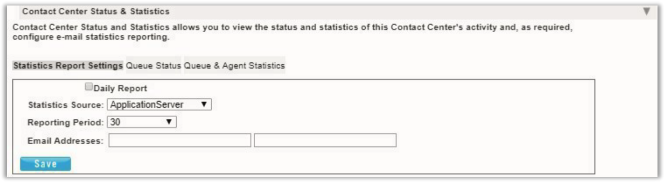
1. Use the ◀ ▶ arrows to move selected Available Agents to/from the Assigned Agents section.
2. Use the ▲ ▼ arrows to select and reorder the agents in the Assigned Agents list.
3. Click the Save button when finished to submit the data and close the dialog.



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:

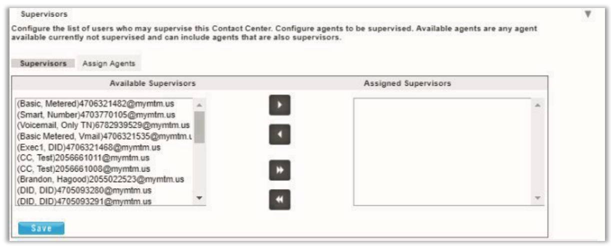


   - Daily Report: Click to enable/disable.
   - Statistics Source: Select the appropriate option from the drop-down menu list.
   - Reporting Period: Select the appropriate number of days from the drop-down menu list, as needed.
   - Email Addresses: Enter email addresses in the fields provided, as needed.
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 Supervisor's* 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 steps 3+4 for other Supervisors.
6. Click on the Save button when finished to update the system and return to the Configure Contact Center Queue dialog.

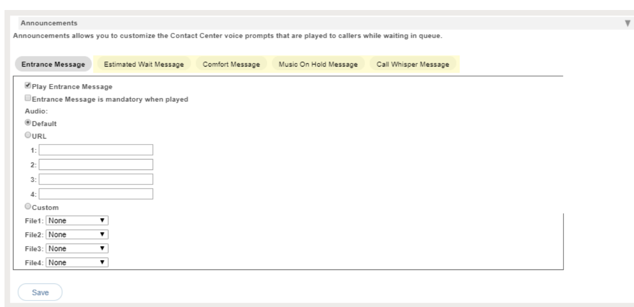


Contact Center Announcements

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

Entrance Message

1. Select and define the following Entrance announcement options, as needed:
   - ☑ Play Entrance Message
   - ☑ Entrance Message is mandatory when played.
   - Audio: Select desired option:
     - ⦿ Default – play the system message.
     - ⦿ 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.



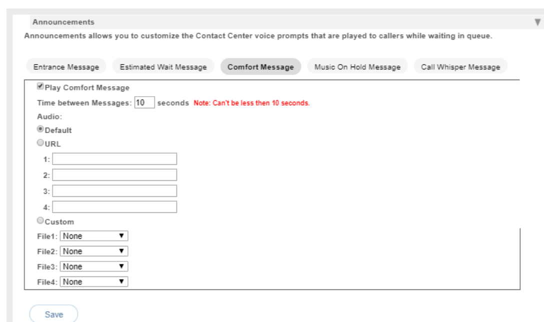
Estimated Wait Message

1. Select the Estimated Wait Message tab and define the following setting options:
   - Enable estimate message for queued calls: Click to place a check in the box ☑ to enable Estimate Wait Messages.

   - Announce Queue Position.
     - Play message for callers in queue positions: X (or lower): Enter the highest number in queue that will hear the queue position announcement.
   - Play high volume message: Click to place a check in the box ☑ to enable.
   - Announce Wait time: Click to ⦿ enable/ disable
   - Play message to callers with a wait time of X (minutes or lower): Enter the highest number of minutes a caller will be waiting when the wait time message will be allowed to play.
   - Play high volume message: Click to place a check in the box ☑ to enable.
   - Default handling time: X (minutes per call): Enter the default handling time per call.
2. Click the Save button when finished to submit the data and close the dialog.

Comfort Message

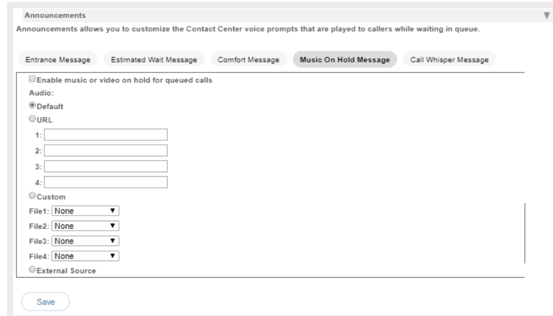
1. Select the Comfort Message tab and define the following setting options:
   - Play Comfort Message: Click to place a check in the box to enable Comfort Messages.
   - Time between messages X (seconds): Enter at least 10 (seconds) in the field.
   - Audio:



     - Default: Click to ⦿ enable the use of system messages.
     - URL: Select to enter specific URLs for audio files which will be played to callers in the order shown (1, 2, 3, 4)
     - Custom: Select to enable and choose from the files in the Announcement repository which will be played to callers in the order shown (1, 2, 3, 4)
2. Click on the Save button when finished to submit the data and close the dialog.

Music On Hold

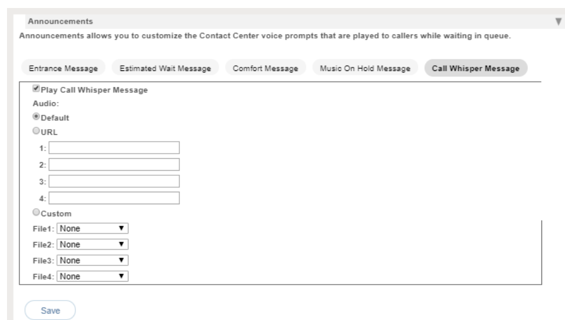
1. Select the Music On Hold tab and define the following setting options:



   - ❖ Enable Music or video on hold for queued calls: Click to enable ⦿ Music On Hold.
   - ❖ Audio
     - Default: Click to ⦿ enable the use of system messages.
     - URL: Select to enable and enter specific URLs for audio files or video which will be played to callers in the order shown (1, 2, 3, 4)
     - Custom: Select to enable and choose from the files in the Announcement repository which will be played to callers in the order shown (1, 2, 3, 4).
     - External Source: Click to select and enable external source.
2. Click on the Save button when finished to submit the data and close the dialog.

Call Whisper Message

1. Select the Call Whisper Message tab and define the following setting options:
   - ❖ Play Call Whisper Message: Click to enable Call Whisper Messages.
   - ❖ Audio



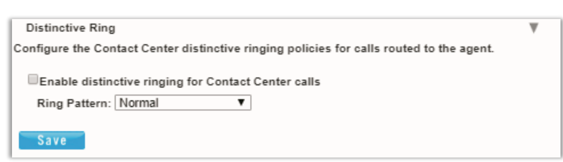
     - Default: Click to enable the use of system messages.
     - URL: Select to enable and enter specific URLs for audio files which will be played to agents in the order shown (1, 2, 3, 4)
     - Custom: Select to enable ⦿ and choose from the files in the Announcement repository
2. Click on the Save button when finished to submit the data and close the dialog.

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.

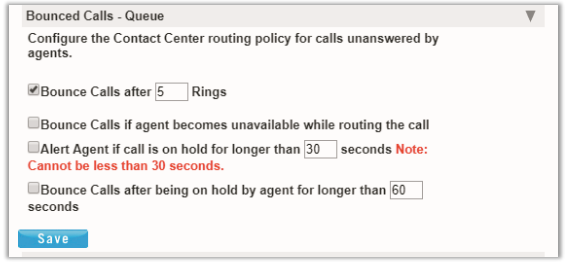


1. Click to ☑ Enable distinctive ringing for Contact Center Calls.
2. Ring Pattern: Select the desired ring tone pattern from the drop-down menu options.
3. Click the Save button when finished.

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. Enter 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

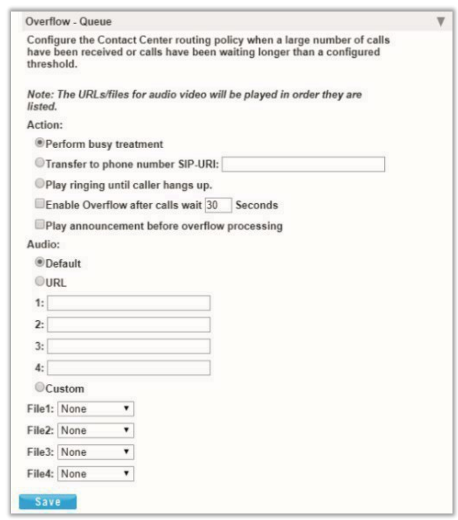
Configure the Contact Center routing policy, including announcements or videos for unanswered calls.

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 - Use the default BW announcement

     ⦿ URL and enter the URL(s) in order of play

     ⦿ Custom and select File(s) in order of play

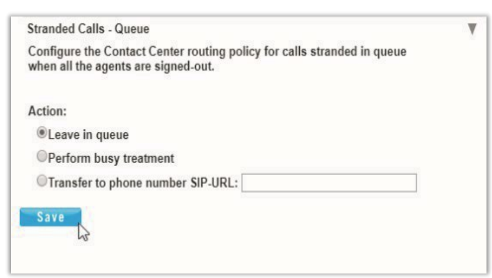


2. Click Save when finished to submit the data and close the dialog.

Contact Center Stranded Calls – Queue

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

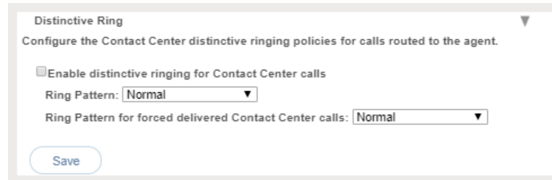
1. Select one of the following action options, as needed for the Contact Center Queue:
   - ⦿ Leave in queue
   - ⦿ Perform busy treatment
   - ⦿ Transfer to phone number SIP-URI: Click to enable and enter the appropriate 10-digit number to which calls will be forwarded.
2. Click the Save button when finished to submit the data and close the dialog.



Contact Center Distinctive Ring

Basic and Premium. Configure special ringtone policies for calls routed to the agent(s).
Click on the View/Edit arrow adjacent to this setting to begin.

1. Select the following setting options, as needed:
   - Enable distinctive ringing for Contact Center calls: Click to enable ⦿ distinctive ringing.
   - Ring Pattern: Choose a ring pattern option from the drop-down list.
   - Ring Pattern for forced delivered Contact Center calls: Choose a ring pattern from the drop-down list.



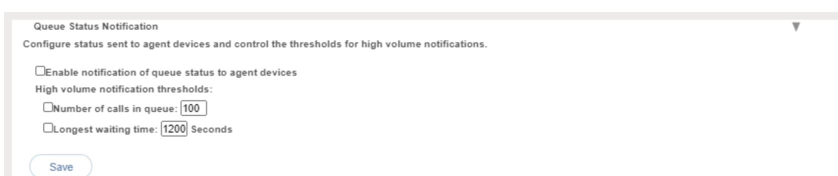
2. Click Save when finished to submit the data and close the dialog.

Contact Center Queue Status Notification

Turn on/off queue volume status notifications sent to agent devices and control the thresholds for high volume notifications.

While working in Contact Center > Edit > Configuration, click on the View/Edit link adjacent to Queue Status Notification to begin.

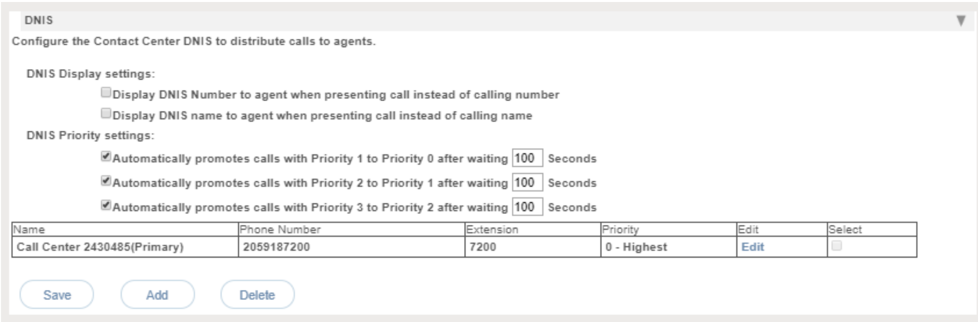
1. Select the following setting options, as needed:
   - Enable notification of queue status to agent devices: Click to enable ☑ or disable ☐ the setting.
   - High volume notification thresholds: Click to enable ☑ the volume threshold type you wish to agents to receive a notification about and define the value as needed. The options are:
     - ☐ Number of calls in Queue: Click to enable ☑ (as needed) and enter the number of calls in the queue that will trigger a notification.
     - ☑ Longest waiting time:_____Seconds - Click to enable (as needed) and enter the amount of time (in seconds) that a call waiting in queue the longest will automatically trigger a notification.
2. Click Save when finished to submit the data and close the dialog.



Contact Center DNIS

Authorized Administrators may have access to manage the Contact Center DNIS configurations. DNIS, or Dialed Number Inbound Service, refers to the called or dialed number. Within the call center application, it is used only to refer to the case where multiple dialed numbers have been associated with a single queue or call center. The system allows configuration of up to 64 DNIS numbers to a single queue. When they are configured, someone calls into a call center and is ultimately directed to a particular DNIS number within a queue. They hear entrance messages associated with that DNIS and the agent receiving the call sees (and/or hears) that DNIS name when the call is delivered so they too know where the caller. DNIS configurations and settings take precedence over related Contact Center Announcement settings.
See also: Contact Center Announcements

While working in *Contact Center > Edit > Configuration*, click on the View/Edit link adjacent to DNIS to begin.



Manage DNIS Display Settings

1. Select and define the following DNIS Display settings, as needed for DNIS numbers:
    - ☐ Display DNIS Number to Agent when presenting call instead of calling number – Click within the adjacent box to enable ☑ or disable ☐.
    - ☐ Display DNIS name to agent when presenting call instead of calling name – Click within the adjacent box to enable ☑ or disable ☐.
2. Click Save when finished to submit the data and close the dialog.

Manage DNIS Priority Settings

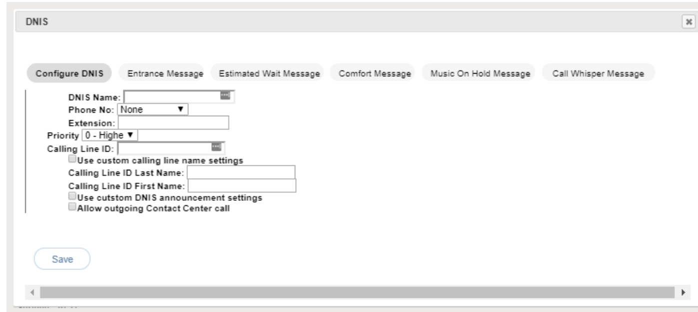
1. Enable ☑ and define the following DNIS Priority settings, as needed for DNIS numbers:
    - Automatically promotes calls with Priority 1 to Priority 0 after waiting X Seconds.
    - Automatically promotes calls with Priority 2 to Priority 1 after waiting X Seconds
    - Automatically promotes calls with Priority 3 to Priority 2 after waiting X seconds
2. Click Save when finished to submit the data and close the dialog.

Add DNIS

While working in the Contact Center Configuration – DNIS Edit view:

1. Click on the Add button to begin creating a new DNIS listing.

The DNIS *Edit* view offers tabs for defining multiple setting options.

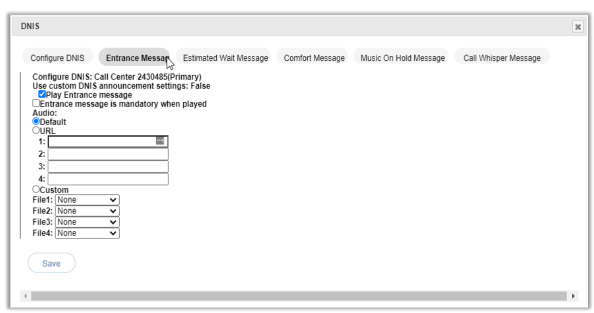


Configure DNIS

1. Enter or select the following settings options, as needed:
   - ❖ DNIS Name (required): Enter a name in the field.
   - ❖ DNIS Phone No: Select a phone number from the drop-down list.
   - ❖ Extension: Enter an extension that is defined in your system.
   - ❖ Priority: Select an option from the drop-down list.
   - ❖ Calling Line ID: Enter the display information.
   - ❖ Use custom calling line name settings: Click within the check box to enable ☑ and enter the following:
     - Calling Line ID Last and First Name: Enter the custom last and first names to be displayed for this line (caller ID)
   - ❖ Use Custom DNIS announcement settings: Click within the check box ☑ to allow the setup and use of settings found in the other tabs at the top of the view.
   - ❖ Allow outgoing Contact Center Call: Click to enable and allow agents to dial out using this DNIS.
2. When finished, click on the Save button to update the system with the new information and close the view, or continue on to define additional settings in the other tabs where their use is enabled or available.

DNIS Entrance Message

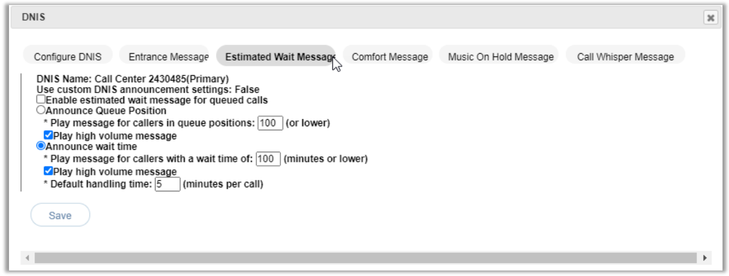
1. Select and define the following Entrance announcement options, as needed:
   - ❖ ☑ Play Entrance Message: Click within the check box to enable or disable ☐.
   - ❖ ☑ Entrance Message is mandatory when played: Click within the check box to enable or disable ☐.
   - ❖ Audio: Select and define the desired option(s):
     - ⦿ Default – Select if you wish to use the system's default message.
     - ⦿ URL - Enter the URL(s) in the fields – these define the order of play (1,2,3,4)
     - ⦿ Custom - Select the custom file(s) to be played in the order shown (1,2,3,4).



2. Click the Save button when finished to submit the data and close the dialog or continue on to define additional settings in the other tabs where their use is enabled or available – as needed.

DNIS Estimated Wait Message

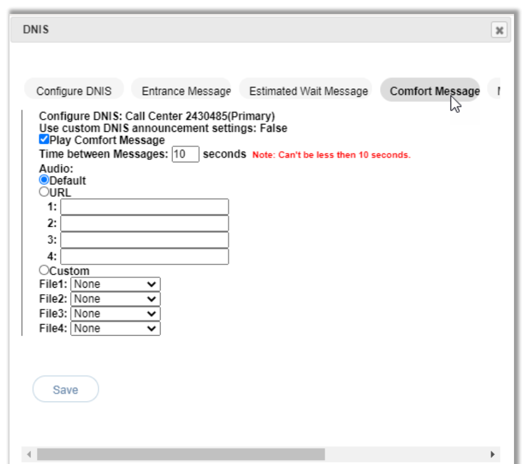
1. Select the Estimated Wait Message tab and define the following setting options:
   - ❖ Enable estimate message for queued calls: Click to place a check in the box ☑ to enable Estimate Wait Messages.
   - ❖ Announce Queue Position: Click within the radial button to ⦿ enable and define:
     - ▪ Play message for callers in queue positions: X (or lower): Enter the highest number in queue that will hear the queue position announcement.



   - ❖ Play high volume message: Optional. Click to place a check in the box ☑ to enable.
   - ❖ Announce Wait time: Click to ⦿ enable/ ○ disable and define:
     - ▪ Play message to callers with a wait time of X (minutes or lower): Enter the highest number of minutes a caller will be waiting when the wait time message will be allowed to play.
   - ❖ Play high volume message: Click to place a check in the box ☑ to enable and define:
     - ▪ Default handling time: X (minutes per call): Enter the default handling time per call.
2. Click the Save button when finished to submit the data and close the dialog or continue on to define additional settings in the other tabs where their use is enabled or available – as needed.

DNIS Comfort Message

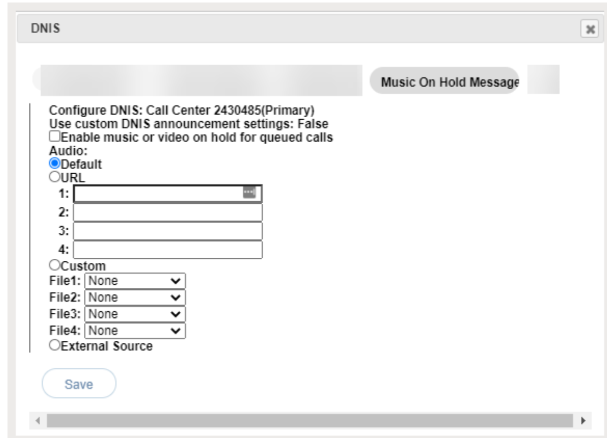
1. Select the Comfort Message tab and define the following setting options:
   - ❖ Play Comfort Message: Click to place a check in the box to enable Comfort Messages.
   - ❖ Time between messages X (seconds): Enter at least 10 (seconds) in the field.
   - ❖ Audio:
     - ▪ Default: Click to ⦿ enable the use of system messages.
     - ▪ URL: Select to enter specific URLs for audio files which will be played to callers in the order shown (1, 2, 3, 4)
     - ▪ Custom: Select to enable and choose from the files in the Announcement repository which will be played to callers in the order shown (1, 2, 3, 4)



2. Click on the Save button when finished to save the data, close the dialog, and return to the DNIS list view.
3. Click Save to submit the new list information and update the system.

DNIS Music On Hold Message

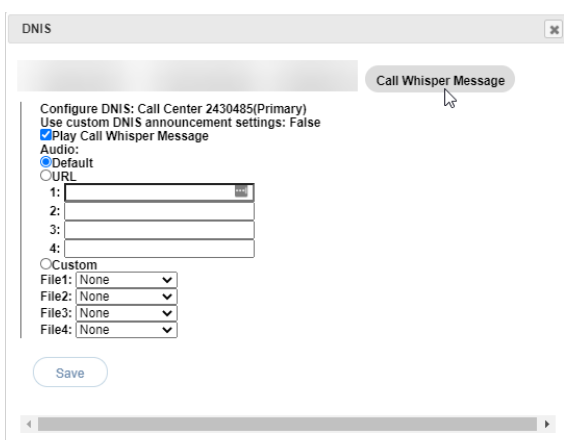
1. Select the Music On Hold tab and define the following setting options:
   - Enable Music or video on hold for queued calls: Click to enable ⦿ Music On Hold.
   - Audio
     - Default: Click to ⦿ enable the use of system messages.
     - URL: Select to enable ⦿ and enter specific URLs for audio files or video which will be played to callers in the order shown (1, 2, 3, 4)
     - Custom: Select to enable ⦿ and choose from the files in the Announcement repository which will be played to callers in the order shown (1, 2, 3, 4).
       - External Source: Click to select and enable ⦿ external source.



2. Click on the Save button when finished to save the data, close the dialog, and return to the DNIS list view.
3. Click Save to submit the new list information and update the system.

DNIS Call Whisper Message

1. Select the Call Whisper Message tab and define the following setting options:
   - Play Call Whisper Message: Click to enable Call Whisper Messages.
   - Audio
     - Default: Click to enable the use of system messages.
     - URL: Select to enable and enter specific URLs for audio files which will be played to agents in the order shown (1, 2, 3, 4)
     - Custom: Select to enable ⦿ and choose from the files in the Announcement repository
2. Click on the Save button when finished.
   The Add DNIS dialog closes and the DNIS list displays.
3. Click Save to submit the new list information and update the system.



Edit DNIS

While working in Contact Center DNIS settings view:

Note: The primary DNIS listing cannot be edited and is read only to protect that configuration. Contact your Account Manager or Customer Support if the primary DNIS configuration requires changes.

1. Click on the Edit link adjacent to the desired non-primary DNIS in the list to open the edit view.
2. Make changes to the available settings and options, including any message options, as needed.
3. Click on the Save button to submit the changes and return to the DNIS list view.
4. Click on the Save button to update the system with the new information and close the view.

Delete DNIS

Use Caution. All related underlying settings for the selected DNIS number are deleted as well and must be recreated if deleted in error. Note: The primary DNIS listing cannot be deleted in the Portal and is read-only to protect that configuration. Contact your Account Manager or Customer Service for assistance if the primary DNIS configuration requires changes.

While working in Contact Center DNIS settings view:

1. Click to place a check mark in the Select box adjacent to the desired DNIS in the list.
2. Click on the Delete button and click OK when prompted to remove the selection from the list.
3. Click Save when finished to update the system with all changes and close the view.

Contact Center Call Disposition Codes

Premium. Manage the Call Disposition Codes used to identify things like marketing promotions or special characteristics pertaining to the call. The disposition codes contain two elements: an identification value and a description.

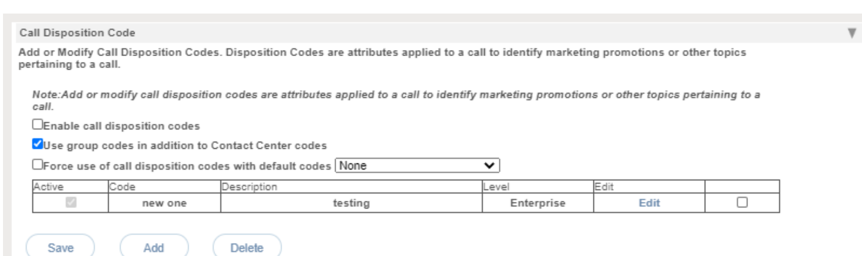
Disposition codes can be used to address multiple scenarios, for example:

- ❖ Capturing the result of the call (“Requires Follow-Up”, “Issue Resolved”, “Contacted Sales Rep”),
- ❖ Capturing customer comments (“Angry”, “Happy”, “Called Multiple Times”)
- ❖ Capturing marketing campaign feedback (“Print Advertisement”, “Web Site”, “Direct Mailing”).

Disposition codes may be entered by the call center agent while the call is in progress or once the call has been finished and the call center agent is in Wrap-up state.

Call Disposition Codes can be entered at the Contact Center queue level and at the Enterprise level. See also: Enterprise Call Disposition Codes

To access this setting while working in Contact Center go to *Edit > Configuration, click on the View/ Edit link adjacent to Call Disposition Code to begin.*

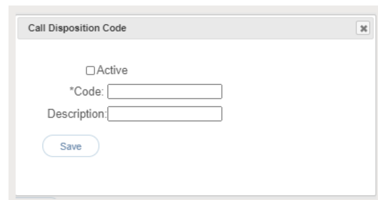


Manage Call Disposition Code Usage

1. Select and define the following basic service usage setting options, as needed:
   - Enable call disposition codes: Click within the box to enable ☑ / disable ☐ the use of Call Disposition codes.
   - Use group codes in addition to Contact Center Codes: Click within the box to enable ☑ / disable ☐ the use of Group Codes along with Contact Center Codes.
   - Force use of call disposition codes with default codes______Click to enable ☑ and select the default code that will be entered automatically if for some reason an agent does not enter one manually from the list of options provided in the drop-down menu.
2. Click Save to update the system with the new information for Call Disposition Codes.

Add a Call Disposition Code

Authorized Admins may create a custom call disposition code at the Contact Center Queue level while working in the Call Disposition Code *Edit* view:



1. Ensure that Call Disposition Codes are Enabled.
2. Click on the Add button.
3. Select and define the following:
   - Active: Click to place a check in the box ☑ to set this new code to Active when saved.
   - Code: Enter a code in the field provided.
   - Description: Enter a concise description of the purpose of the code - e.g., 'MKTG Campaign 6.20'
4. Click the Save button when finished to add the custom disposition code to the list in the Edit view and close this dialog.

Activate a Call Disposition Code

The system offers several ways to manage whether call disposition codes are active and may be used by call center agents.

- Enable Call Disposition Codes: Click to place a check in the box to allow call disposition codes to be used.
- Click to place a check in the Active check box that is offered when Adding or Editing a call disposition code. Note: Always click the Save button after making changes.

Edit a Call Disposition Code

The list displayed in Call Disposition Codes offers access to Edit individual code description and activation information. The code cannot be edited.

1. Click on the Edit link adjacent to a Call Disposition Code within the table list.
2. Make changes to the Description or to the Active setting.
3. Click Save when finished to update the system with the changes.

Delete a Call Disposition Code

Caution! This action is immediate and cannot be undone. While working in the Edit view for Call Disposition Codes, an Admin may delete a contact center queue level Call Disposition Code. Please note, the codes defined at the Enterprise level cannot be deleted at the Contact Center level.

1. Select the code you wish to remove by clicking to place a check in the box ☑ in the far right column adjacent to the code.
2. Click on the Delete button to immediately remove the code from the list.

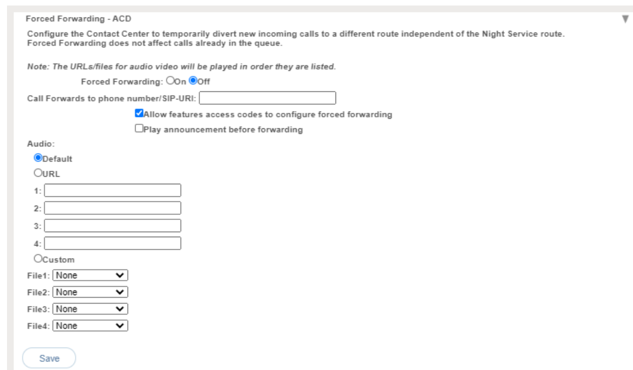
Contact Center Routing Policies

Call Centers temporarily hold calls in the cloud when all users assigned to receive calls from the queue are unavailable. Call Centers provide an automated “answer” with customizable greetings, comfort messages, and hold music for the caller to listen to.

Queued calls are routed to an available agent when he/she is no longer on an active call. Each call queue is assigned a lead number, which is a telephone number outside callers can dial to reach the agents assigned to thecal queue. Call Centers are also assigned an internal extension, which can be dialed internally to reach the agents assigned to the call queue.
The following sections offer examples of the types of routing policies that may be managed.

Forced Forwarding – ACD

Premium. Configure the Contact Center to temporarily divert new incoming calls to a different route independent of the Night Service route. Enabling Forced Forwarding does not affect calls already in the queue.



Note: The URLs/files for audio or video that are defined will be played in the order they are listed.

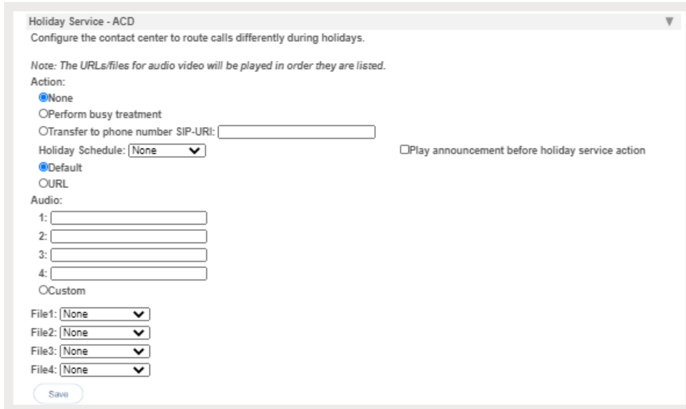
While working in *Contact Center > Edit > Configuration*, click on the Edit/View drop-down to open this setting for management.

1. Select and/or define the following setting options as needed for **Forced Forwarding – ACD** usage:
   - Forced Forwarding On | Off: Click within the appropriate radio button to turn on ⦿ or ○ off.
   - Call Forwards to phone number/SIP URI: Enter the phone number or SIP-URI in the field provided.
   - Allow feature access codes to configure forced forwarding: Check this box if you would like the Call Center Supervisor to use their phone to activate (***51**) and deactivate Redirect (***52**) through the use of a star code / feature access code.
   - Play announcement before forwarding: Click to enable ☑ and complete the following setting options as needed for the audio to be played...

   Audio:
   - Default - Click to set as the default system message.
   - URL - Click to use specific files and enter up to 4 URLs in order of play.
   - Custom: Click to use custom files that have been entered into the system and select up to 4 in the order of play from the drop-down selection tools.
2. Click Save when finished to update the system with the new information.

Holiday Service – ACD

Premium. The Holiday Service - ACD allows an optional message to be played and a different routing treatment for special days and Holidays where workers may not be present. To access while working in *Contact Center > Edit > Configuration*, click on the *Edit/View* drop-down to openthis setting for management. Select or define the following actions and setting options, as needed:



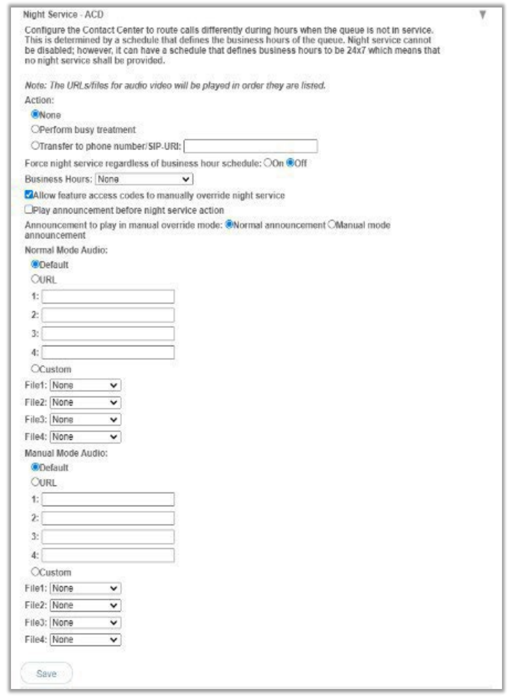
1. Select and define the following: Action:
   - ⦿ None: Calls are left in queue.
   - ⦿ Perform Busy Treatment: Click to use the busy treatment.
   - ⦿ Transfer to phone number/ SIP-URI: Click to route calls to an alternate phone number/SIP- URI and enter the correct destination information.
   - Holiday Schedule _ : Select a schedule from the drop-down list. This list displays the Holiday Schedules defined in Enterprise Time Schedules.
   - ⦿ Default: Click to use the default announcement, which is “Your call is very important to us, but you have reached us on a scheduled holiday. Please call backduring normal business hours or wait to leave a message.”
   - ⦿ URL: Click to use an alternate audio or custom message and select accordingly below.

   Audio:

   If URL was selected above, choose from the following and define as necessary:
   - URL: Click to use specific files and enter up to 4 URLs in order of play.
   - Custom: Click to use the custom announcement files that have been entered into the Announcement Repository and select up to 4 in the order of play via the drop-down selection tools.
2. Click the Save button when all changes are complete to update the system and close the dialog.

Night Service – ACD

Premium. The Night Service option configures the routing, treatment, and announcement behaviors for calls received after normal business hours (Night service).

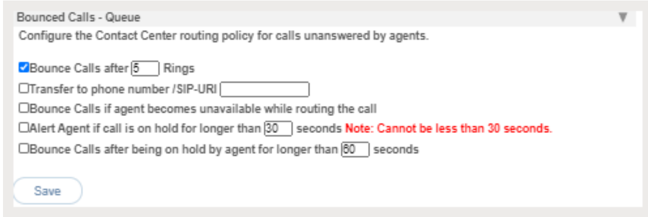


1. Select and define the following setting options for Night Service actions, as needed:
   - ⦿ None: Default. Calls are left in queue.
   - ○ Perform busy treatment: Click to select this option and set the service to perform busy treatment for calls during non-business hours.
   - ○ Transfer to phone number / SIP-URI: Click to select this option and route calls toan alternate phone number/SIP-URI then enter the correct destination information inthe adjacent text field.
   - Force night service regardless of business hour schedule On ○ |Off ⦿ (default) Click within the ⦿ On radio button to enable this option and allow the supervisor or administrator to override the Business Hours schedule (defined below) and manually initiate Night Service for the queue. This manual override can also be activated by a Call Center supervisor using their phone interface if the feature access code optionis enabled below, as well.
   - Business Hours: Select the appropriate schedule from the drop-down to define businesshours.
   - Allow feature access codes to manually override night service: Click to enable and allow Call Center Supervisor(s) to use their phone to activate (***53**) and deactivate (***54**) the Night Service via star code/FAC.
   - Play Announcement before night service action. Click to enable for use with busy treatment or transfer actions. This option can be configured to play an announcement prior to proceeding with the action Night Service. In this case, the announcement is played once to completion before the action is processed.
   - Announcement to play in manual override mode: Click to enable either ⦿ Normal announcement or ○ Manual mode announcement and continue to define the setting options in the corresponding section below for audio behaviors:
   - Audio Mode sections: Based on the selection made for Announcement to play, make option selections in either Normal Mode Audio or Manual Mode Audio forthe following:
     - **Default**: Click to use the default messaging - "Your call is very important to us, but you have reached us outside of business hours. Please call back during normal business hours or wait to leave a message."
     - **URL**: Click to enable the use of URLs and enter up to 4 URLs for the files in the order you wish them to play (1, 2, 3, 4.).
     - **Custom**: Click to enable and use the selection tools to choose up to 4 files from the Contact Center's Announcement Repository in the order they will play (1, 2, 3, 4).
2. Click Save when finished to update the system with the changes for Night Service - ACD.

Bounced Calls – Queue

Standard. Configure the routing policy for calls that are sent to an available agent but go unanswered by the agent in this queue. To access while working in *Contact Center > Edit > Configuration*, click on the *Edit/View* drop-down adjacent to this setting to open the *Edit* view.

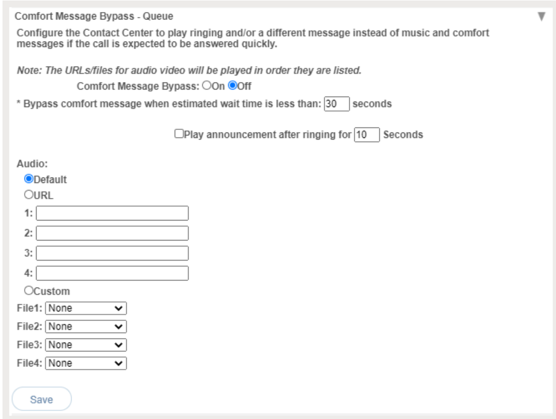
1. Select and define the following setting options, as needed:



   - ☑ Bounce Calls after _x_ Rings: Click to enable and enter the number of rings to allow before thecal is bounced.
   - ☑ Transfer to phone number : SIP- URI _: Click to select this option and route calls to an alternate phone number/SIP-URI then enter the correct destination information in the adjacent text field.
   - ☑ Bounce Calls if agent becomes unavailable while routing the call: Click to enable this option to bounce calls being sent to an agent if the Agent transitions to an *unavailable* state while the call is end route.
   - ☑ Alert Agent if call is on hold for longer than — seconds: Click to enable this service option if you wish for the system to notify the Agent if a call sent to them from the queue was put on hold for longer than the time defined here (in seconds). *Note: 30 or more seconds are required here*.
   - ☑ Bounce Calls after being on hold by Agent for longer than seconds. Click to enable this service option if you want the system to automatically bounce a call that has been on hold for longer than the time defined here (in seconds).
2. Click Save when finished to update the system with the changes made for Bounced Calls – Queue.

Comfort Message Bypass – Queue

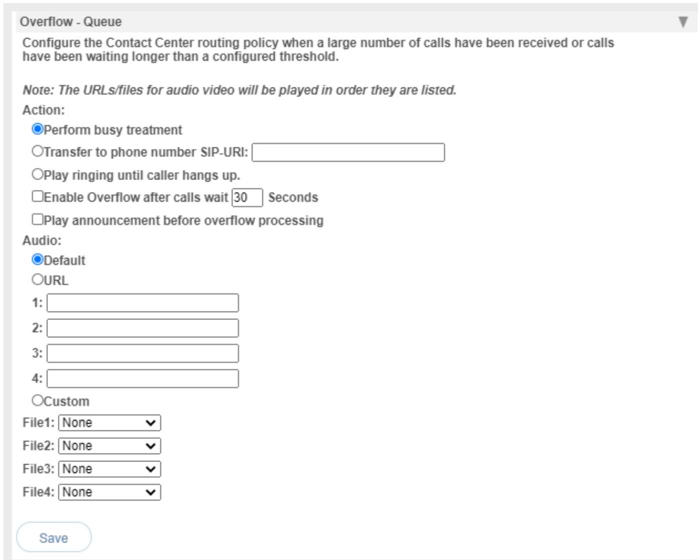
Premium. This service policy offers the use of an alternate audio message if calls are expected to be answered quickly. When enabled, the usual comfort/Music-On-Hold treatments are bypassed, and the settings defined here are used. Note: This policy applies after the entrance message has finished playing(if applicable). While working in *Contact Center > Edit > Configure*, click on the *View/Edit* drop-down arrow adjacent to this setting to open the *Edit* dialog:



1. Select and/or define the following setting options:
   - Comfort Message Bypass ○ On | ⦿ Off (default): Click within the ⦿ On radio button to enable this service.
   - ☑ Bypass Comfort message when estimated wait time is less than_____ seconds: If the wait time is less that the amount entered here, the Bypass Comfort Message will be used. Enter the desired wait time in seconds.
   - ☑ Play announcement after ringing for ___ Seconds: Click ☑ to Enable and set the number of seconds to allow ringing before the alternate message will be presented to the caller, then set the message **Audio** source below.
     - ⦿ **Default**: Click to use “Please hold while we transfer you to an agent.”
     - ○ **URL**: Click to select the use of URLs and enter up to 4 URLs in the order you wish them to play (1, 2, 3,4.).
     - ○ **Custom**: Click to select and use the selection tools to choose up to 4 files from the Contact Center’s Announcement Repository in the order they will play(1, 2, 3, 4).
2. Click on the Save button when finished to submit the changes and close the *Edit* dialog.

Overflow – Queue

Basic, Standard, and Premium. Overflow treatment is applied to calls when the Call Center reaches its size limit or when callers have been in the Call Center for a specified amount of time. For example, if the Call Center queue size limit is set to 20, the twenty-first caller will be routed to the overflow destination. Likewise, if the overflow timer is set to two minutes, after two minutes, callers will be routed to the overflow destination. Use this section to define the routing policy and/or message behavior when a large number of calls have been received or calls have been waiting longer than a configured threshold.



While working in *Contact Center > Edit > Configure*, click on the drop-down arrow adjacent to Overflow – Queue to open the edit dialog.

1. Select and/or define the following options as needed for Overflow routing:

Action:

- ⦿ Perform busy treatment: Click to select this action – the caller hears a fast busy tone when Overflow treatment is in effect.
- ⦿ Transfer to phone number SIP- URI: Click to select this option and route calls to an alternate phone number/SIP-URI when Overflow treatment is in effect, then enter the correct destination information in the adjacent text field. This entry can be an extension, another phone number/queue, or even an external number.
- ⦿ Play ringing until caller hangs up: Click to select this option and callers will hear ringing until they disconnect when overflow treatment is in effect.
- ☑ Enable Overflow after calls wait ___ Seconds: Click to select this option and apply overflow treatment to queued calls after a certain amount of time. Enter the amount of time in seconds. If the maximum number of queued calls is met, the next call to be presented to the queue is treated with the Overflow actions that are also defined in this area once the call has waited the specified amount of time.
- ☑ Play announcement before overflow processing: Click to select and then define the audio selection that will be played prior to performing the overflow action setting(s) defined above.

Audio:

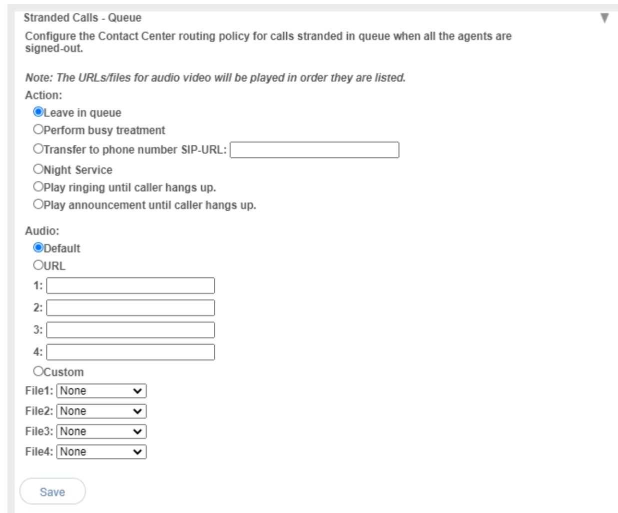
- ⦿ **Default**: Click to select and use the default system message - "Your call is very important to us, but due to the high volume of calls we cannot answer your call. Please hold while we transfer you to Voice Messaging so that we can help you as soon as possible."
- ○ **URL**: Click to select the use of URLs and enter up to 4 URLs in the order you wish them to play (1, 2, 3, 4.).
- ○ **Custom**: Click to select and use the drop-down tools to choose up to 4 files from the Contact Center's Announcement Repository in the order they will play(1, 2, 3, 4).

2. Click on the Save button when finished to submit the changes and close the *Edit* dialog.

Stranded Calls – Queue

Standard and Premium. Configure the processing / routing policy for any calls that are left stranded in queue when there are no agents currently signed in. (An agent is said to be staffing a queue if the agent has joined the queue and is not in the Sign-out state.) If the last agent staffing a queue “unjoins “the queue or signs out, then all calls in the queue become stranded and will be handled as described by the settings defined here. If an incoming call is received by a queue with no agents staffing the call center, then the call is initially put in the queue.

Once the queued call should be offered to an agent, and if there are no agents staffing the queue, then the call is processed as a stranded call. In particular, if the *Entrance Message is mandatory…* option is enabled or the queue elsewhere, then the entrance message is played to completion before the call is handled as a stranded call. See also: Entrance Message; DNIS Entrance Message



While working in *Contact Center > Edit > Configure*, click on the drop-down arrow adjacent to Stranded Calls – Queue to open the *Edit* dialog.

1. Select and/or define the following action options, as needed for Stranded Calls:

   - ⦿ Leave in Queue: (default) Click to select this action option. Calls will simply remain in the queue.
   - ⦿ Perform busy treatment: Click to select this action option, and calls will be removed from the queue and receive a fast busy tone.
   - ⦿ Transfer to phone number / SIP-URI _: Click to select this action option and enter the destination information in the data-entry field. Calls stranded in queue are removed from the queue and transferred to the configured destination.
   - ⦿ Night Service: Click to use this action option. Calls will be handled according to the Night Service configuration. Note: If the Night Service action is set to None, then the Stranded Calls policy will perform similarly, and calls remain in thequeue.
   - ⦿ Play ringing until caller hangs up: Click to select. Calls are removed from the queueand provided with ringing until the caller disconnects.
   - ⦿ Play announcement until caller hangs up: Click to select and then choose/define the audio selection below. The calls will be removed from the queue and the message selection(s) will be played on a loop until the caller disconnects/ends the call.

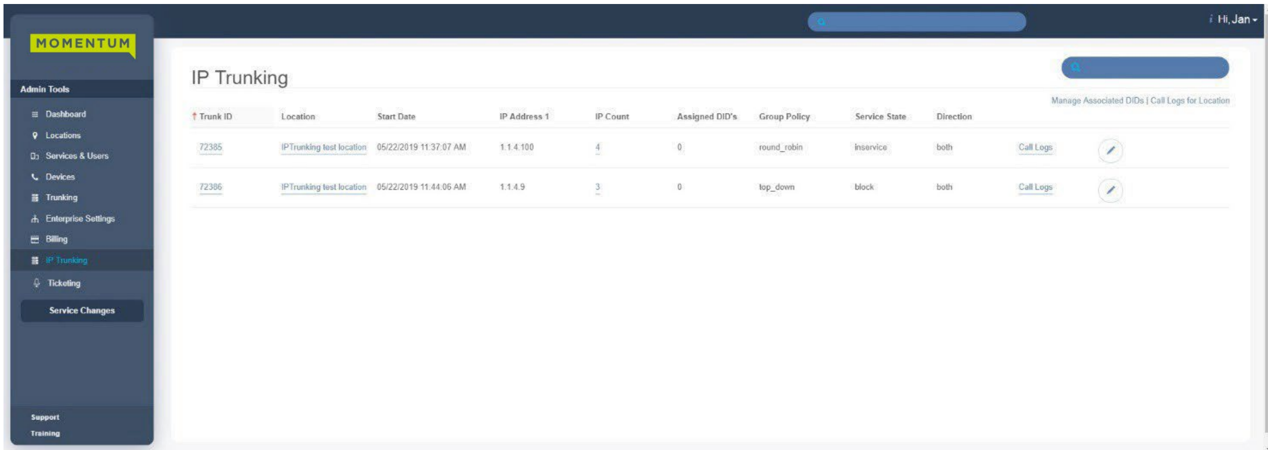
   Audio:

   - ⦿ **Default**: Click to select and use the default system message - “Your call is very important to us, but no agents are available.”
   - ○ **URL**: Click to select the use of URLs and enter up to 4 URLs in the order you wish them to play (1, 2, 3, 4.).
   - ○ **Custom**: Click to select and use the drop-down tools to choose up to 4 files from the Contact Center’s Announcement Repository in the order they will play (1, 2, 3, 4).

2. Click on the Save button when finished to submit the changes and close the *Edit* dialog.

*IP TRUNKING

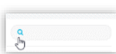
Only organizations that have specialized Trunk Groups will see this section and only Authorized Administrators who manage their system's specialized SIP Trunks should access to this section's management tools.



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 ID's, Group Policy, Service State, and Direction (Calls) information for each location.

Section Search



Locate data found within the IP Trunking table.

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.

Edit

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

Trunk Group IP Count

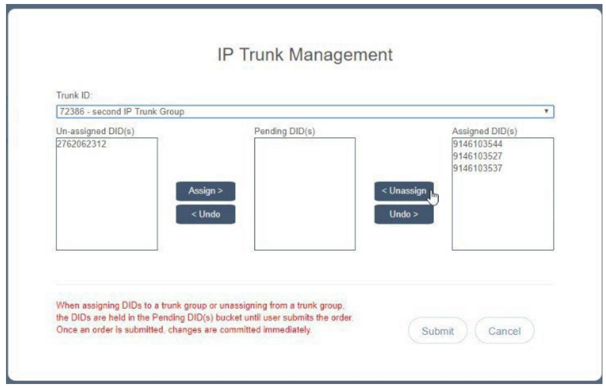
The IP Count column displays the current count of IPs and a click on the number listed within the IP Count column for the Trunk Group opens a dialog to display a listing the current IPs.

Manage Associated DIDs

Use Caution. Any association changes are committed immediately upon clicking *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 clicks Submit for 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 time frame. 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

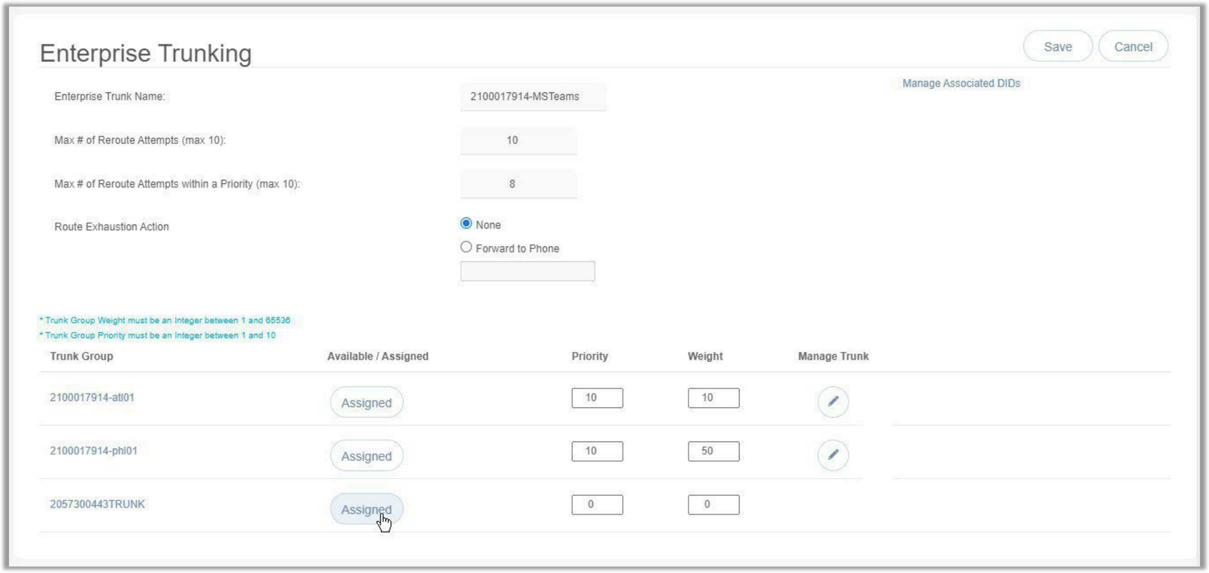
Click on the Edit icon adjacent to the IP Trunk Group listing (far right column) to open the *IP Trunk Group* page. Fields that cannot be edited display the icon when the cursor is placed over the field. field. Make changes to the editable fields.

Manage IP Trunk Call Paths

See: IP Trunking Call Path

*ENTERPRISE TRUNKING

Only organizations that have specialized Enterprise SIP Trunk Groups will access this section and only experienced *Trunk Administrators should attempt to work with these management tools.*



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.

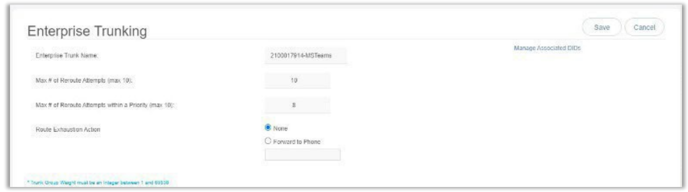
Data within the *Available/Assigned*, *Priority* and *Weight* columns may also be edited using the tools provided.

Edit

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

Manage Enterprise Trunking Routing

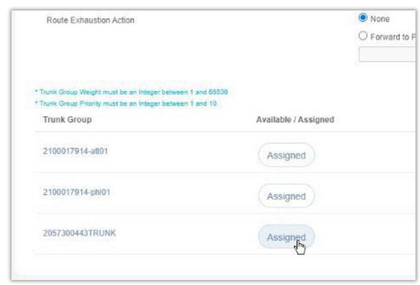
The top section of the Enterprise Trunking page offers some general call routing settings that are applied to the listed Trunk Groups below.



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.

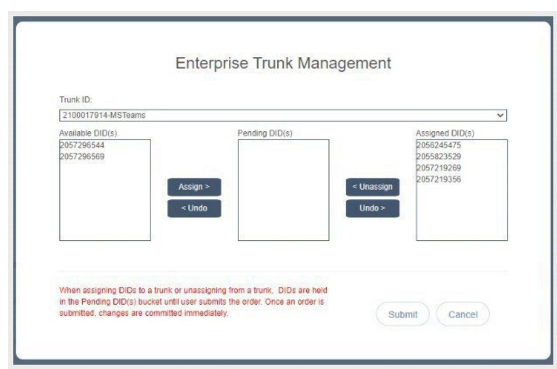


To manage this setting while working in Enterprise Trunking:

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

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.



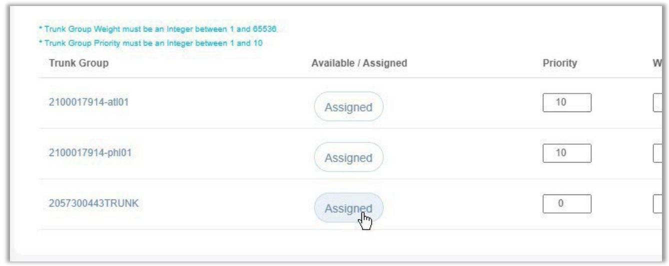
1. Click on the link to open the Enterprise Trunk Management dialog.
2. Select a Trunk ID from the drop-down selection tool.
3. Select one or more DIDs you need to manage in either the **Available DIDs** or **Assigned DIDs** section.
4. Choose an action:
   - Click on the **Assign >** button if you wish 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 as the system updates.

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:

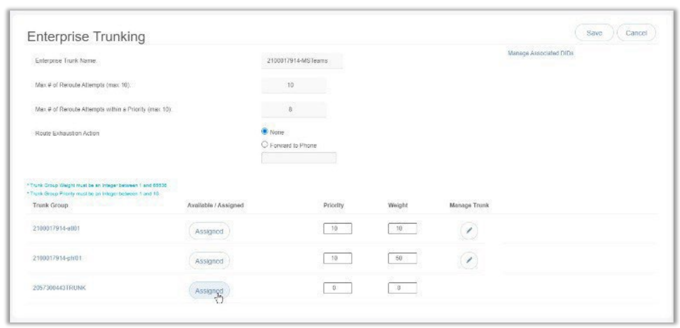
1. Locate the Trunk Group in the list.
2. Click within the **Priority** field.
3. Select a value (1-10) using the selection tool.
4. Click Save (top right) to submit the change.



Manage Enterprise Trunk Group Weight

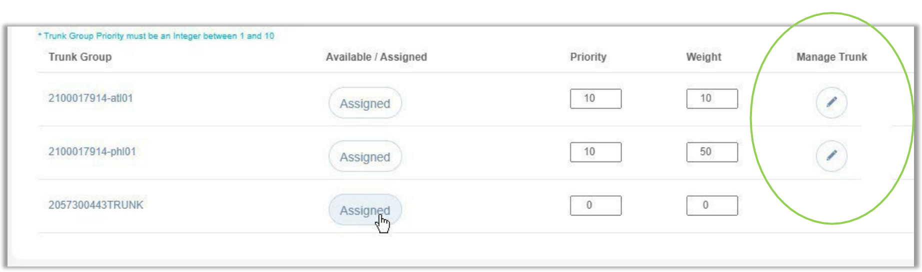
Each Trunk listed in the table offers a tool to define the weight. This tool is a data entry field under the column titled Weight which shows the current entry for the setting per Trunk Group.
An individual Trunk Group's weight must be an integer between 1 and 65536.

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



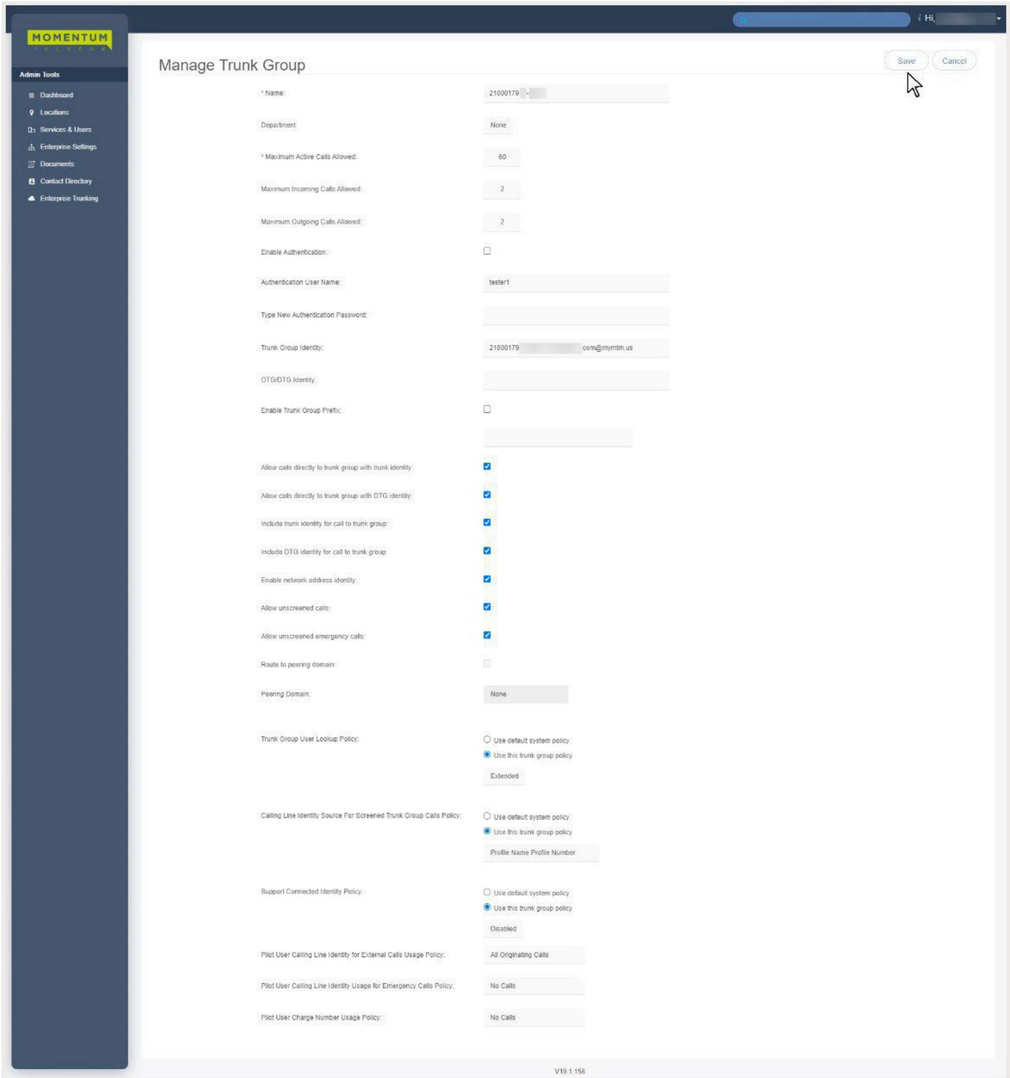
Manage Enterprise Trunk Group Settings

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.



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.



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 Valls 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 **O**utgoing **T**runk **G**roup/ **D**estination **T**runk **G**roup 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.

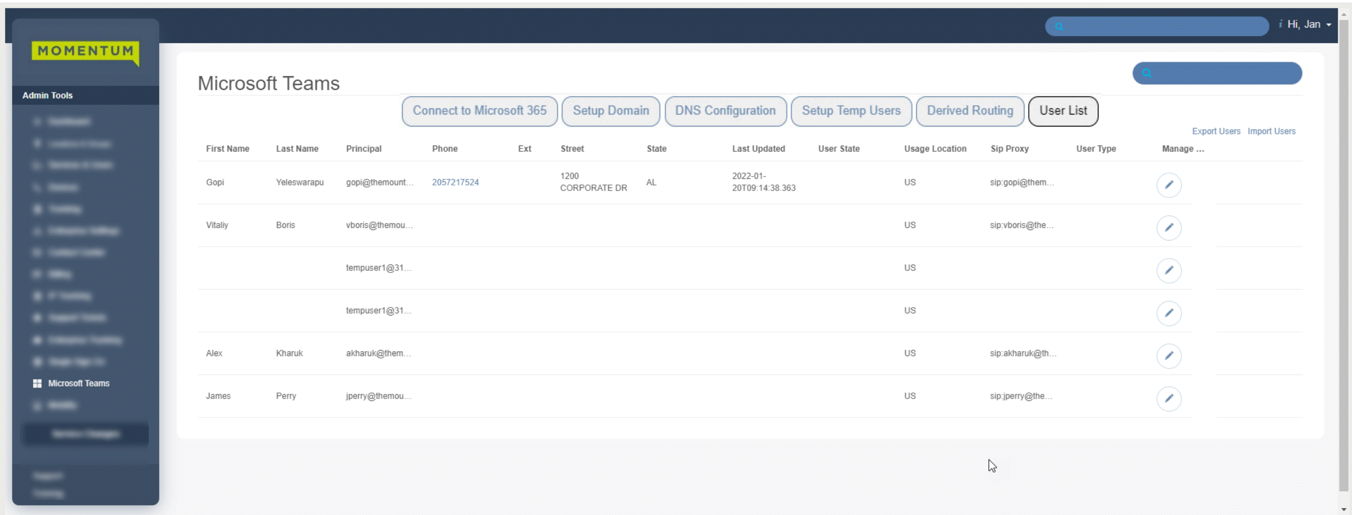
- Allow calls directly to trunk group with trunk identity: Click within this check box to Enable ☑ or Disable ☐.
- Allow calls directly to trunk group with DTG identity: Click within this check box to Enable ☑ or Disable ☐.
- Include trunk group identity for call to trunk group: Click within this check 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.

*Microsoft Teams

Limited/Restricted Access. Only organizations that have Microsoft Teams connector integrations may see this section and only Authorized Microsoft Teams Administrators should access and use these management tools.

The Microsoft® Teams section requires advanced permissions for MS Teams Admins and 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:

Deployment Tabs:

- Connect to Microsoft 365 - Restricted/Limited access for Teams Admins to connect to MS Teams
- Setup Domains - Restricted/Limited access for Teams Admins to setup domains on correct zones
- DNS Configuration - Restricted/Limited access for Teams Admins for DNS configuration
- Setup Temp Users - Restricted/Limited access for Teams Admins to create example temp users
- Derived Routing - Restricted/Limited access for Teams Admins for Derived Routing setup

Post-Deployment Tabs:

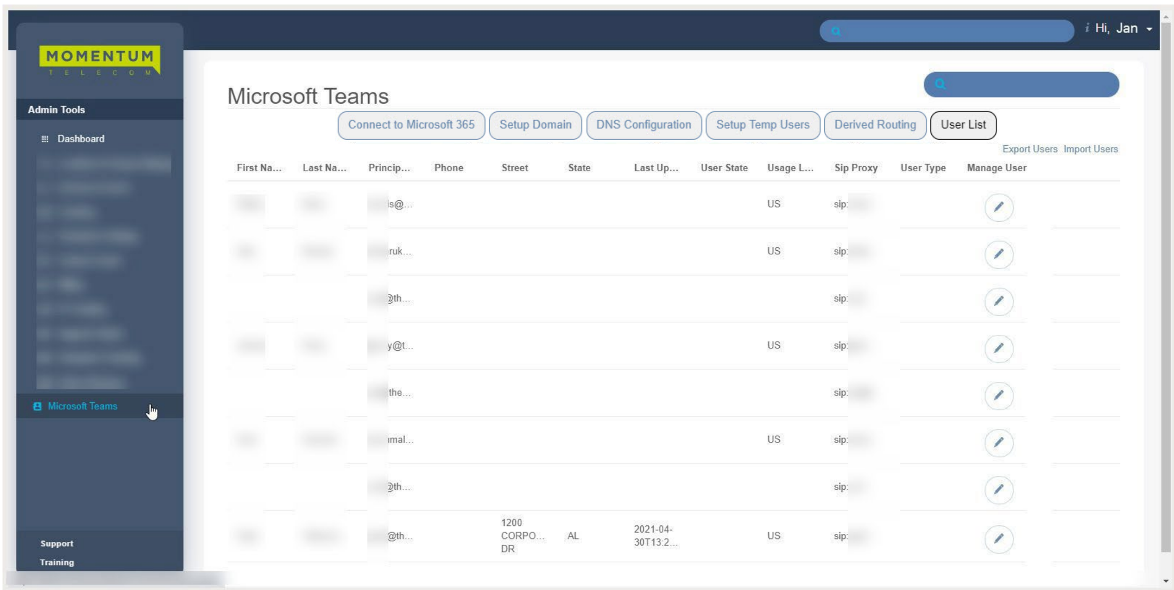
- User List - Restricted/Limited access for Teams Admins to manage TN / Derived Routing assignments for integration with the service provider's network

Note: Only a limited set of tasks may be completed in this portal. MS Teams Admins can review useful deployment / setup information and manage settings limited to Call Routing access or TN assignment changes within these sections. 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.

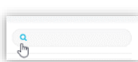
User List

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 call 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 Admin portal. This section is the default view when opening the Microsoft Teams section once deployment is done.



Section Search



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

Columns

The column headers can be clicked to sort list contents alphanumerically. The Phone column contents offer a link to each User's Dashboard after TN assignment for easy access to view or edit any non-Teams voice services/settings available for management in this portal.

Edit

Teams Admins Only.
The Edit button next to each listing in the table opens the Edit dialog for TN assignment or Call Routing maintenance.

Export Users

Teams Admins Only.
Click this link to export a correctly formatted .csv file template containing current TN data for Teams Users to your local system to edit specific Teams User account data. Note: Use with caution. Customer Support should be contacted for assistance.

Import Users

Teams Admins Only.
Click this link to import a correctly formatted .csv file containing specific User data from your local files into the portal to update TN assignment or routing enable/disable settings. Use with caution. Or - simply use the Edit feature for a specific user listing. Contact Customer Support for assistance.

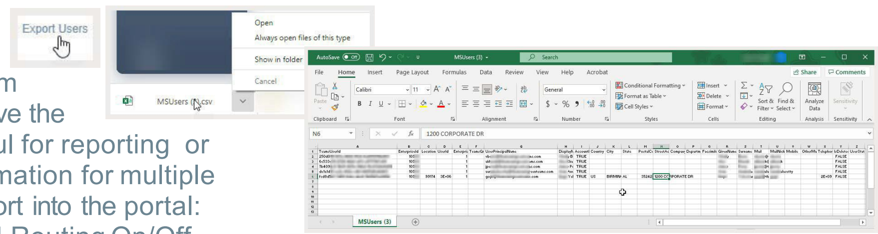
Search Teams User List

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 redisplay 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 the TN assignment and routing on/off setting can 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 Derived Routing On/Off.



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

Import List

Click this link at the top right of the *User List* view to import a correctly formatted .csv file containing specific User data from your local files into the portal. This is useful when there is a need to update the TN Assignment of a large number of Teams Users. Otherwise, the Edit icon next to a User in the list offers access to complete this task for individual Teams Users. Use caution. See also: Export List.

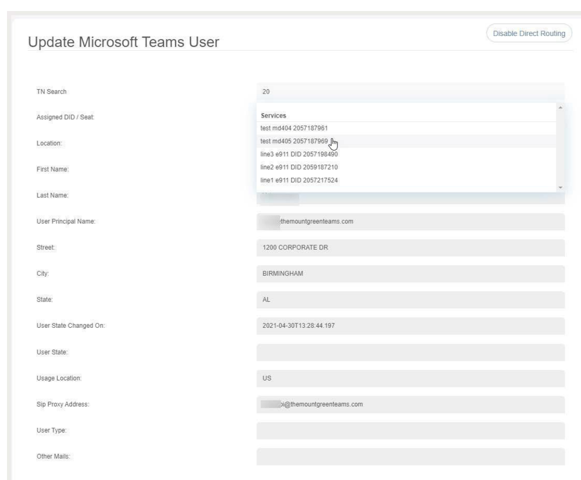
Manage Teams User - TN Assignment

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.

1. Click on the Edit icon adjacent to the desired User in the far-right Manage User column.

While working in Microsoft Teams > User List:

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 telephone numbers 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 an item 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 new TN for Teams calls.

Upon completion, click on Microsoft Teams in the left Navigation Menu or the User List button at the top of the view to return to the User List - or select another area of the My Cloud Services Portal to review.

Manage Teams User - Routing

Authorized Teams Admins may have access to manage the Teams User call 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 for settings/features that may be managed in MS Teams portal.

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. Only the TN Search field can be edited.
2. Click on the Enable/Disable Derived Routing button (top right).
   

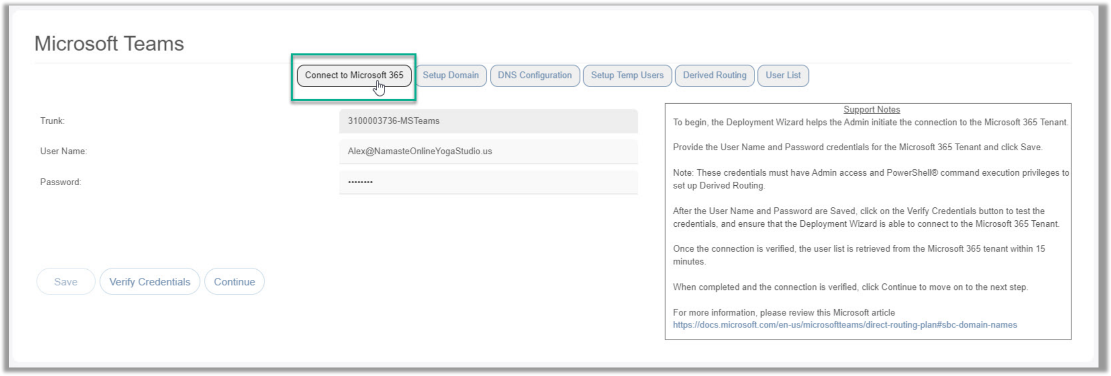
   This button is dynamic and shows the action that can be taken currently.
   For example, when Derived Routing has already been setup the button displays *Disable Derived Routing*.
   - **Enable**: Ensure a TN has been assigned and confirmed and then click Enable Derived Routing.
   - **Disable**: Click the Disable Derived Routing button to turn routing off.
     Use Caution: This action also removes the current TN Assignment.
     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 without making a change.

   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 Admin may exit this dialog and 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.

Teams Deployment Tabs

Connect to Microsoft 365

Teams/Microsoft 365 Administrators Only. This Microsoft Teams section tab is for deployment of the connection to the MS Teams instance and use should be restricted to MS Teams Administrators. It allows an authorized Teams Admin to begin the setup and deployment process by securely entering and verifying the correct Admin Username/Password access credentials for their Microsoft 365 or O365 Teams account to create the connection. Other fields in this tab are pre-formatted to contain the correct information and cannot be edited. The Notes section displays instructions and information about tasks performed at this step in the deployment process.



During Deployment: The User Name and Password fields need to be completed with the Microsoft365/ O365/Teams account access credentials, Saved, and then Verified. All other fields are read-only and pre-formatted to contain the correct information for setup. The password credentials are secured and obscured.

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

Post-Deployment: The User Name and Password may be updated (and verified) by an authorized Teams Admin when necessary. All other fields remain read-only.
Only a Teams Admin should attempt to make changes in the Microsoft Teams section.

Add Microsoft Teams Account Admin Access Credentials

1. Enter Microsoft 365/O365 Administrator User Name and Password credentials using the secured fields provided.
2. Click Save to update.
3. Click Verify Credentials - the system will verify the connection and provide a success or failure notification.
   Check the account information in Microsoft 365/Teams and retry entry of credentials as necessary until a successful connection is made.
4. If this is the initial deployment, click Continue (or click on the Setup Domain tab) to proceed to the next deployment step - or select another Admin Tools menu option to complete other tasks.

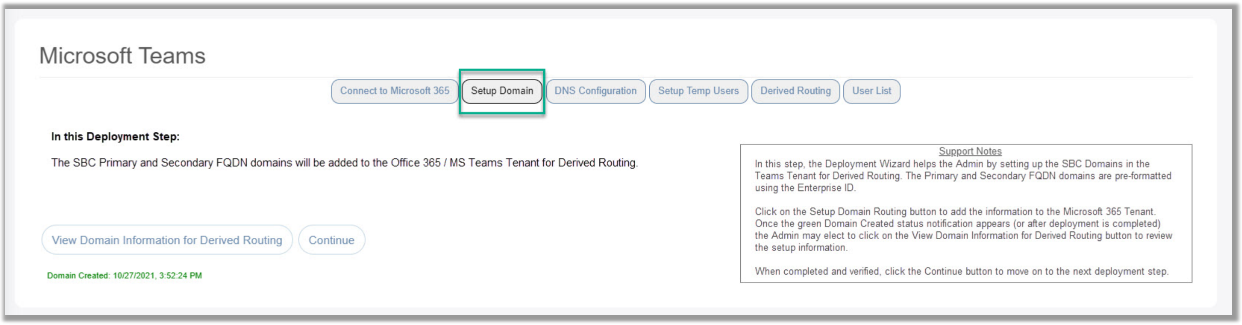
Edit Microsoft Teams Account Admin Access Credentials

Only Authorized Teams Administrators should be permitted to edit the account access credentials for the organization's Teams instance connection within the Cloud Services Portal when they have been updated/changed in the Microsoft 365 account.

1. Enter new Microsoft 365/O365 Administrator User Name and Password credentials
2. Click Save when the new credentials are entered.
3. Click Verify Credentials and wait for the success notification.
   Check the credentials in MS Teams and try again if the verification process is unsuccessful.

Setup Domain

During the deployment process, this tab section provides access for an authorized Teams Admin to submit the domain information and complete the first step for enabling Derived Routing for the account. The Notes section offers brief instructions and information about the task performed at this step.



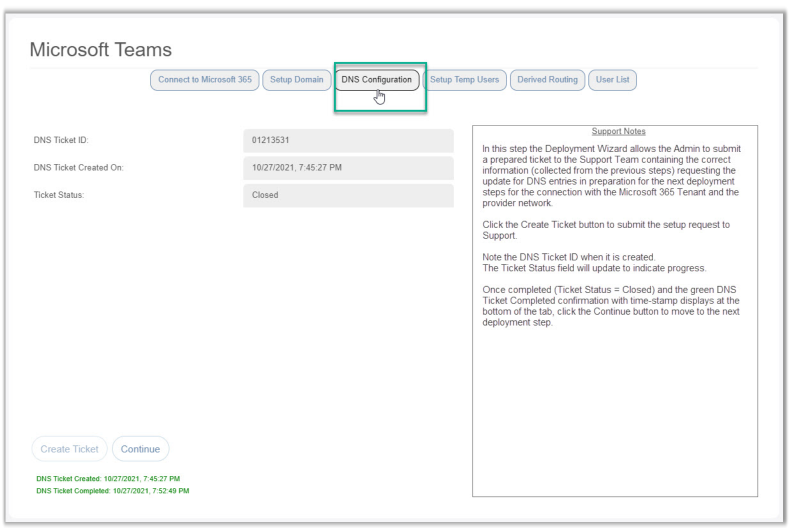
The information in this deployment tab is read-only and cannot be edited.
An authorized Teams Admin may click the Setup Domain Information for Derived Routing button to perform this deployment task. A creation timestamp displays at the bottom of the tab when completed.
Click Continue to move on to the next step in the deployment process.

View Domain Information for Derived Routing

Post-Deployment, an authorized Teams Admin may review the setup completion notification and click View Domain Information for Derived Routing to see the setup information in this tab.

DNS Configuration

This deployment wizard tab allows an authorized Teams Admin submit a request for DNS domain creation and configuration on the correct zone for the account. The Notes section displays brief instructions and information about the tasks performed in this tab for deployment.



The information in this tab is read-only cannot be edited. 🚫

An authorized Teams Admin may click the Create Ticket button during this step in deployment to auto-submit a prepared ticket to the correct department and then review ticket number and subsequent completion notifications when that process is complete and the ticket is closed.

Once the Ticket Completed notification displays below the buttons in the tab, click Continue to display the next tab and the next deployment step.

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 MS Teams Admin may review ticket number and subsequent completion notifications when that process is completed, and the ticket with the Service Provider has been closed.

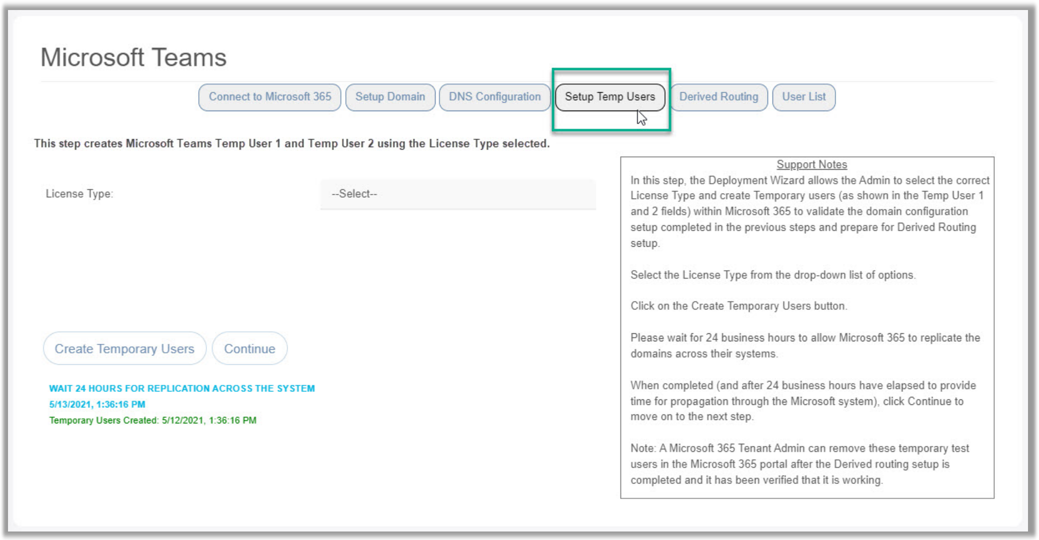
Click Continue when configuration is complete to display the next deployment step.

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.

Setup Temp Users

During the deployment process, this tab allows an authorized Teams Admin to specify the correct License type and then generate the pre-defined temporary users for the account. The system will take some time to replicate and update completely before further deployment tasks can be performed.

The Notes section displays instructions and information about for the tasks performed in this section for deployment.



During deployment, the two Temp Users displayed in this tab are auto-populated from those set up in MS Teams and cannot be edited. The Teams Admin may complete the following tasks here:

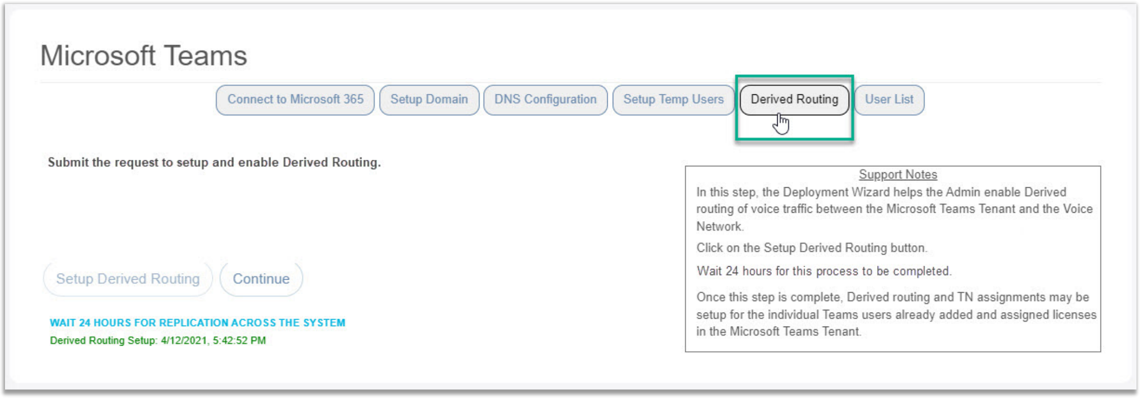
- Select the correct License Type from the drop-down list of supported licenses.
- Click the Create Temporary Users button. This submits the information for creation.
  Upon completion, Authorized Teams Admins can review the creation notification data.
- Check back after 24 hours to review and click the Continue button to move on to the next step.

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

Derived Routing

This Microsoft Teams 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 step for enabling Derived Routing.
The Notes section offers brief instructions for the task that can be performed in this tab.

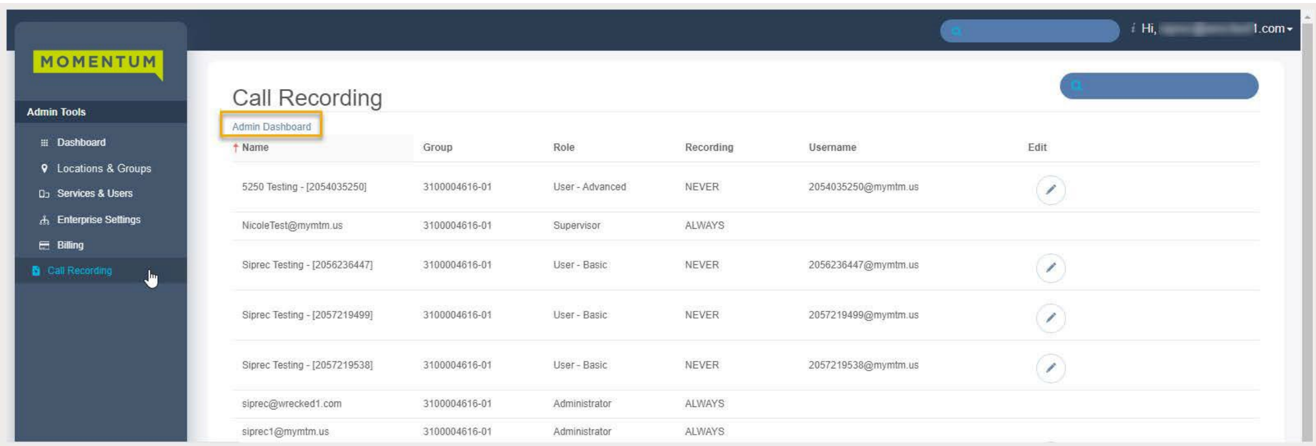


During Deployment: The fields in this tab are auto-populated with the correct information and cannot be edited. An authorized Teams Admin may click the Setup Derived Routing button during Deployment to initiate the setup process. Note: this process takes approximately 24 business hours to complete and 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 derived routing readiness verification information in this tab.

*CALL RECORDING

Limited Access section for Call Recording voice setting and access administration tasks. Authorization required. The Call Recording section displays to authorized Administrators only if Call Recording licenses have been provisioned for users on the account.



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 the Edit icon next to a listing to make changes.

Manage Call Recording-Related Voice Settings

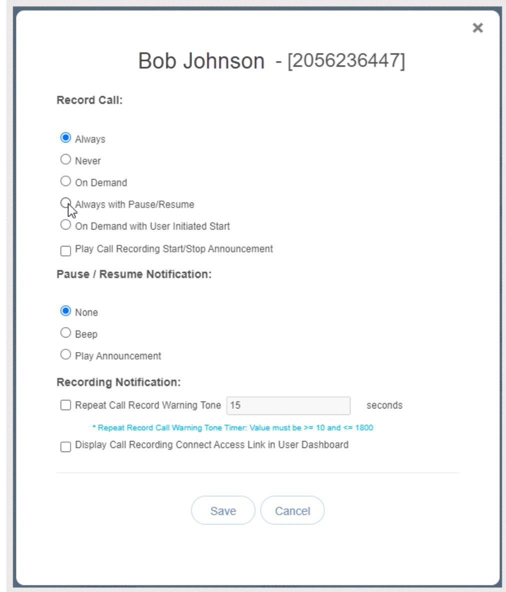
While viewing the Call Recording page:

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 from their device 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 <u>from the start of the call</u> when the user manually starts 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 during the time the user initiates and ends 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* recording should occur within a call.
- ⦿ Never – If selected, the user's calls will not be recorded or saved until a different option is selected.
- ☑ Play Call Recording Start/Stop Announcement - Click to enable the use of an automated announcement when recording is manually started or stopped by the user (when Pause/Resume or an On Demand setting is selected). *See also the Play Announcement Notification below.*
- ☑ Record Voice Messaging - Option displays for Executive+ Seats only if enabled for use in BroadWorks Click to enable call recording of voicemails left by callers.



Pause Resume Notification - Select one of the following options for notifications when using the pause feature:

- ⦿ 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 if selected.
- ⦿ Play Announcement – If enabled, a brief automated announcement plays at Pause/Resume.

Recording Notification - Elect to use warning tones, as desired:

- Optional: ☑ Click to enable the use of a repeating warning tone during recorded calls and set the number of seconds between the tones being played. Minimum = 10 sec | Maximum = 1800 sec. Example: 120 = every 2 minutes. The defaults for this = OFF and 15 seconds.

- ☐ Display Call Recording Connect Access Link in User Dashboard. **Default = OFF**.

This is an optional access control setting to manage access link display within the My Cloud Services Portal. Click to add a check mark in the box to ***allow* authorized and licensed** Call Recording Portal Supervisors or Admins to view a link to the Call Recording site when logged into their My Cloud Services Portal account in the Dashboard (or within the Call Recording section if enabled for a My Cloud Services Portal Admin's account).
Important Note: Most Call *Recording License holders should <u>not</u> have access to the Call Recording site. Those who will **<u>not</u> be accessing** the 3rd party Call Recording Portal as a licensed Supervisor or Admin to work with recorded calls should have not have this setting turned on and it should be kept disabled/turned* ***OFF*.**

4. Click the **Save** button at the bottom of the dialog when finished to update the settings.
Or click the **Cancel** button, or the X (top right) to exit the dialog without making changes.

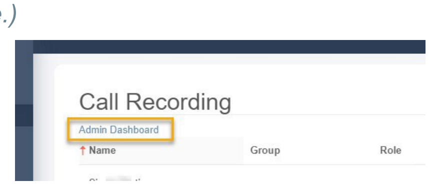
Access the Call Recording Portal

Authorized Call Recording portal Admins logged into the My Cloud Services portal as an Admin may have access to a direct link to the Call Recording portal from the ***Call Recording*** section in Admin Tools.

Note: Links to open the Call Recording portal will only allow the level of access the user has (if any) to work in it. If a My Cloud Services Portal Admin does not have sufficient access permission to work in the Call Recording portal, the system will not allow automatic sign in. If the license holder is a call recording portal admin or supervisor, but NOT a My Cloud Services Portal Admin, they can be allowed to see an link in their User Dashboard. (*Refer to the "Display Call Recording Connect Access Link in User Dashboard" setting described above.)*

While viewing the Call Recording section:

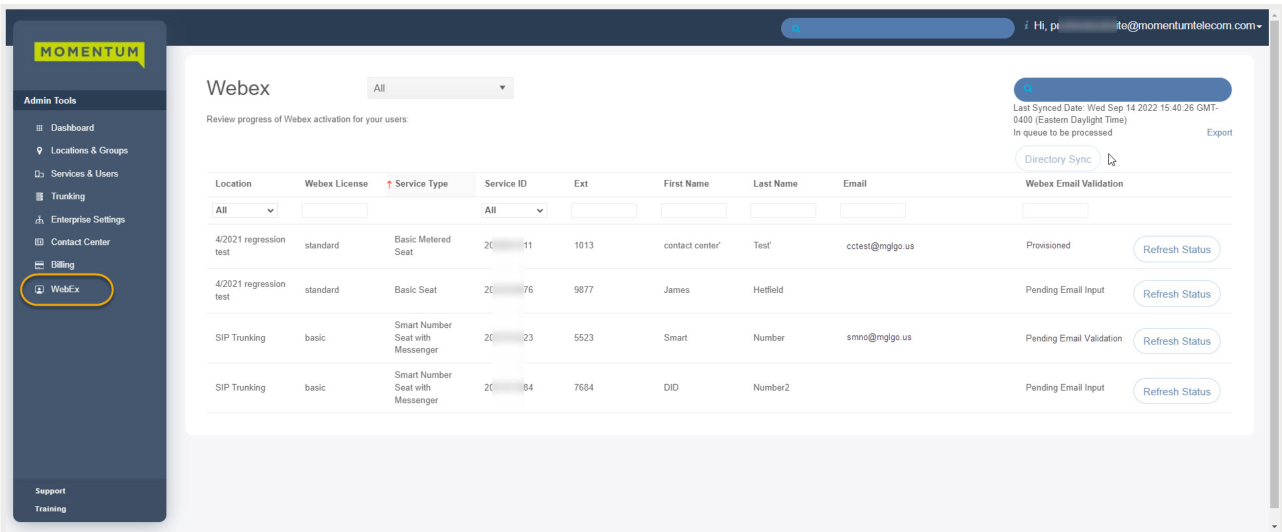
Click on the **Admin Dashboard** link (top left above the list).
This opens the Call Recording portal in a new browser window tab.



*WEBEX

Limited Access section for accounts with Webex application licenses only.

The Webex section displays to authorized Admins only if Webex licenses have been purchased for users on the account. The Webex page displays the current Webex Self-Activation process state for each licensed user (as of the last refresh of the data) in a searchable and sortable table. This is useful for tracking each user's self-activation status. The information displayed in the table is read-only. A listing with an email entry in the Email column has at least begun the Self-Activation process.



Section Tools

- Drop-Down Selection Tool (top right) - allows the Admin to filter the table contents by useful Webex Self-activation process states, as needed. Filter options here can include:
  - All - (Default) Displays the licensed Webex users on the account at any self-activation process state.
  - Provisioned - Displays the licensed users that have completed self-activation and are provisioned in Webex.

    These users are able to download and install Webex, or may have done so and completed the Self-Activation and installation process.
  - Pending Email Input - Displays the licensed users that have not begun self-activation by submitting their email address for validation in the Webex activation portal.
  - Pending Email Validation - Displays the licensed users that have entered their email in the activation portal and Webex is in the process of validating that the email address is not already in use, or has instructed the user to delete old account(s) using that email address and is awaiting completion of that task to proceed with validation for use with this license.
  - Provisioning - Displays the licensed users that have validated their email with Webex and Webex is in the process of preparing the account to allow download and install of the Webex application.

- Section Search Tool (top right in the page) - search terms found in the table below.

- Column Headers - sort the table data below alphanumerically by the column contents.

- Refresh Status - click this button adjacent to a listing in the table to check for the latest Webex self-activation process status of an individual license holder.

- **Directory Sync** Click the **Directory Sync** button (top right) to manually request contact directory synchronization with Webex.

  - The Directory Sync button can be clicked by an authorized Admin once every 24 hours as long as the button is active. If the button is not active/grayed out, the 24 hour period has not yet elapsed.
  - A status message under the button shows last time attempted and the current status until completion.
  - While processing, the notification displays to identify that a request is in queue and processing.
  - Upon completion of processing, the date/time of the sync completion displays as a notification to Admins.
  - The amount of time to complete the sync is dependent on the number of requests already in queue for the Service Provider and Webex, as well as the size of the data to be updated in all of those requests. The status notification message will indicate when the process had finished for the latest request.

The Directory Sync button becomes unavailable for any Admin to click while a request is in queue processing and for 24 hours after a request to synchronize was completed.

Please Note:

- At least **one** (1) Webex license holder on the account (and listed in the table) must have completed self-activation on the Momentum control hub and completed login within their desktop application in order for Webex to identify the enterprise for directory synchronization. If no licensed users have activated at the time an Admin clicks the Directory Sync button, the Directory Sync will add the request to the queue, attempt to process, and then will eventually return an error message since a sync can't be performed until there is at least one licensed user who has activated and logged into their Webex application.

- Directory Synchronization is automatically performed by Webex at least once every seven (7) days for activated enterprises. There are no notifications displayed in the Webex applications or this portal when these automated syncs performed by Webex occur. The automated Webex Directory Syncs do not impact the usage of the Directory Sync button in the Webex section.

Important Note: A license holder that does not have an email address listed in the Email column, and/or one that has a *Status* of Pending Email Input, has <u>not yet</u> begun the process of Self-Activation in the Webex activation portal and has not installed the Webex application.

- **Export** link (top right) allows the Admin to download the listings in the current table view (Filtered or Sorted) to a .csv spreadsheet file that can be saved locally.

- **Additional Filters** Helpful table filtering fields below the sortable column headers allow the user to filter by Location, License Type, Service ID, Ext(ension), First or Last Name, Email address, and/or Email Validation Status

*Advanced Permission Sections

Restricted Access Sections

The service provider in conjunction with the organization's management will define which Administrators (if any) will be granted access to one or more provider level advanced permission sections and any tools that may be found within them. This level of access will not be granted until well after implementation and system stabilization have been completed. These are areas where improper usage can negatively impact billing or services, and Administrators must have more advanced expertise and specialized additional training *prior* to access being granted by the Service Provider.

By default, these areas are <u>not</u> made available to an organization's Administrators.

Only Authorized Administrators should be provided with access to view or work with the tools in the following restricted access sections.

- Billing
- Service Changes
- Devices

Note:

Momentum Telecom provides expert, 24/7 assistance and maintenance for our customers. This exceptional level of service is how we make sure each and every customer is well taken care of and their systems continue to be healthy and problem-free.

The Advanced Permission areas are 'use at your own risk'. Great caution should be used if access to any of the tools in these areas is granted to your staff.

Should the leadership of your organization decide to discontinue that hands-on support service experience and attempt to implement self-management of additional billing and service impacting areas of the telephony and integrated services on your system instead, it is recommended that caution should be used when deciding whether to allow Admins to be trained to use and then granted access to one or more of the Advanced Permission Sections. Enabling access to these sections requires the assistance of the Service Provider. Completion of additional training on the proper use of the provider-level tools in each of these areas is a prerequisite prior to the Service Provider enabling access and setting up individual Admin tool access.

It is also *recommended* that additional 'self-management' not be attempted until well after the system's implementation has been completed and has been live and in stable use for some time. The typical period to allow for confirmation of the system's health and Administrator proficiency with all other tools is approximately 6 months post-implementation for most of the Provider-Level Advanced Permission sections.

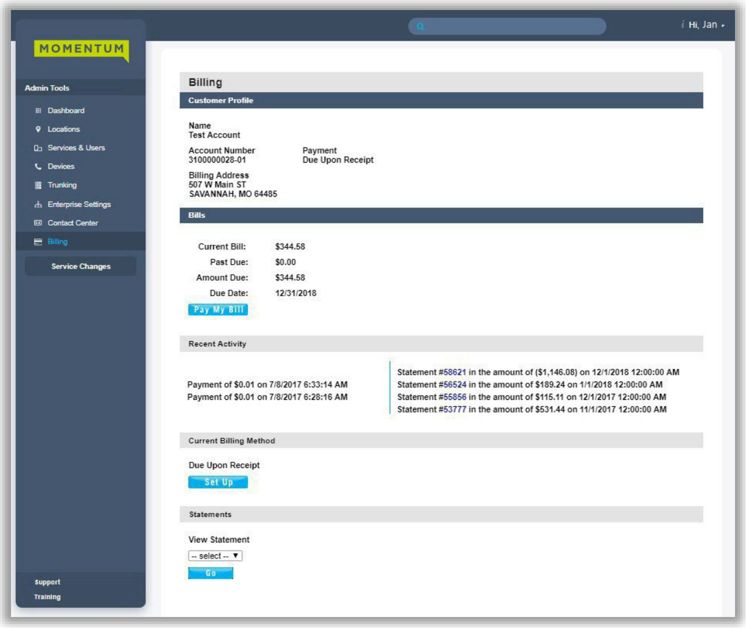
Please contact your Account Manager or Customer Care Management to discuss whether additional access to advanced permission provider-level tools should be attempted or to whom it might be made available.

While additional access to self-manage many tasks that are typically handled by the Service Provider is made available in these Advanced Permission Sections, not <u>all</u> related tasks can be performed by an Admin within this portal. Tasks that cannot be performed from the Portal will still need to be performed by the Service Provider, and, in those cases, an authorized contact for the organization will still be required to contact the Service Provider for assistance with the provider-level actions or tasks that cannot be performed within the My Cloud Services Portal.

*BILLING

Restricted Access. Only Authorized Billing Administrators should access or manage tools in the **Billing** page.

The Billing page provides tools for reviewing and managing the monthly billing and payments for the Enterprise account or Locations on the Enterprise Account (where enabled and authorized for use by the organization).

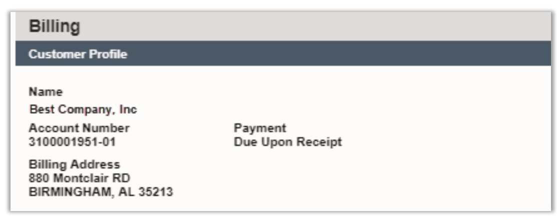


Authorized Billing Admins may also be notified of billing changes, additional charges, or issues in this view.

Note: A drop-down selection tool may display in the Billing page that allows specially authorized Billing Admins who manage accounts payable (AP) for one or more locations to choose the billing data they wish to review and administer by selecting the appropriate location.

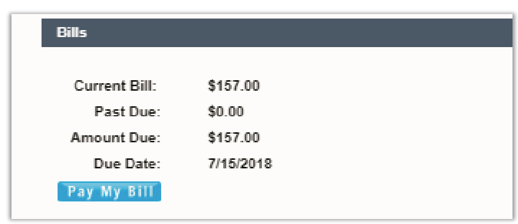
View Customer Profile

The Customer Profile section displays an overview of the current billing address, account number, and the current payment method in use.



View Bills

The Bills section of the page offers up-to-date information for the Current Billing Cycle, any amounts Past Due, and the option to pay the current bill or setup payments. A drop- down selection tool may display allowing Billing Admins to choose specific data to review and manage.



View Recent Activity

The Recent Activity section in *Billing* displays the current payment information and links to review the most recent payment statements.

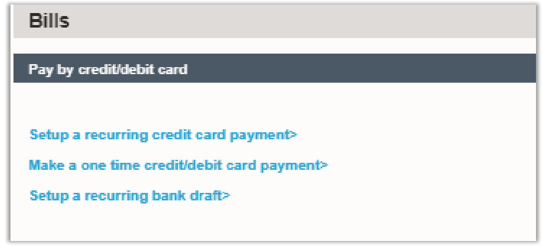
View Current Billing Method

The Current Billing Method section displays the payment method of record and offers another link to Set Up alternate payment methods.

Pay My Bill

Once an authorized Admin is viewing the billing data, the Bills and Current Billing Method sections of the page offer access options to set up payments.

The Pay My Bill button and Set Up buttons both open the *Bills* page where you may select from the following payment method options:

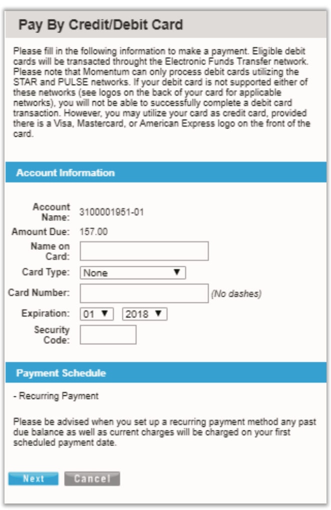


1. Fill in the requested information to make a payment and/or create a recurring payment schedule.

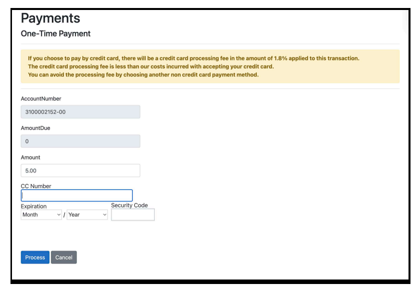
Note: Eligible debit cards will be transacted through the Electronic Funds Transfer network. Momentum can process debit cards on the STAR and PULSE networks or debit cards as credit cards provided there is a Visa, MasterCard, or American Express logo on the front of the card.

2. Click Save or Submit to fill out the forms and complete the payment process you selected.

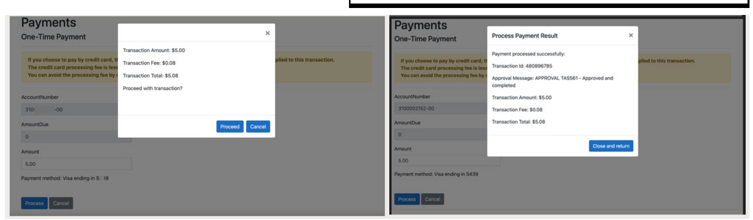
Setup a Credit Card Payment



1. Click the Make a one-time credit/debit card payment link to pay the the current bill. If you choose to pay by credit card, a processing fee (1.8%) will be applied to each processed transaction. Note: The system will provide notifications of the processing fee amount for confirmation before submission and the total with fee amount included after payment is submitted.

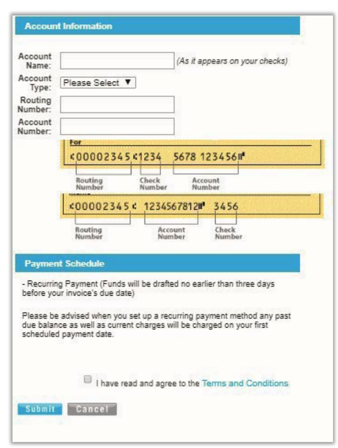


OR



2. Click the Setup a recurring credit card payment link to enter payment information, schedule payments to occur at defined intervals and save this as the payment process. Note: When you initially set up a recurring payment method, any past due balance will be included with the current cycle charges on your first scheduled payment date so that your account is made fully current.

Setup a Recurring Bank Draft



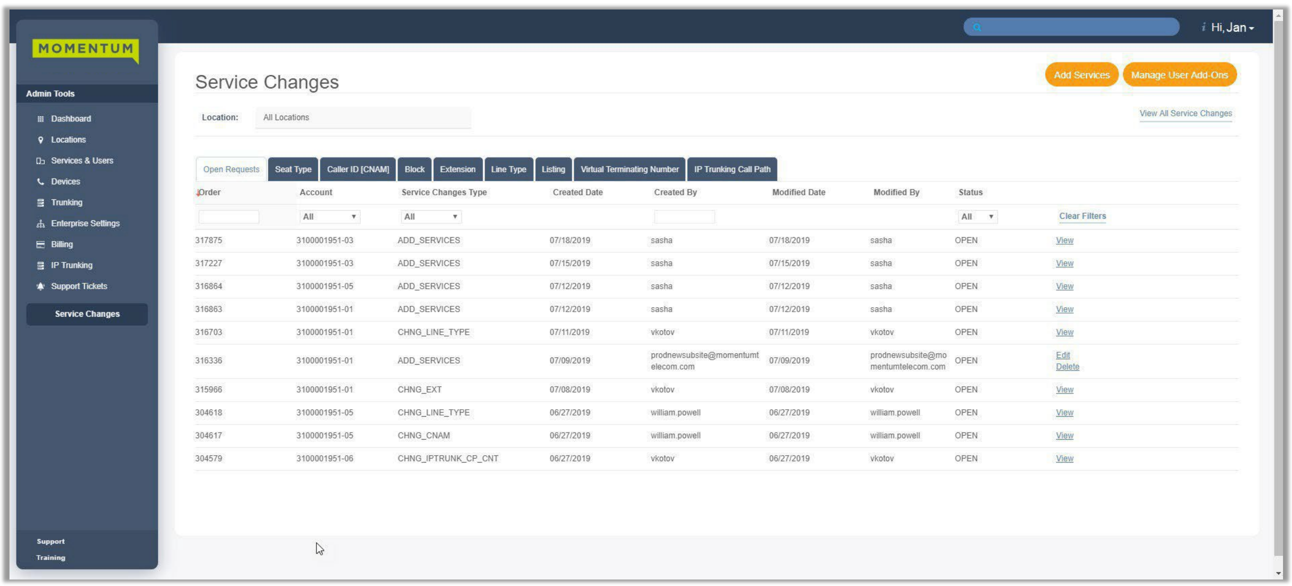
1. Click the Setup a recurring bank draft link and follow instructions to enter account information and schedule recurring withdrawals directly from a bank account.

   Once set up, an option to cancel this method and choose another payment process option becomes available.

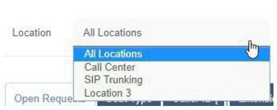
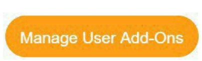
*SERVICE CHANGES

Restricted Access - Provider level.
The Service Changes section of the My Cloud Services Portal is an advanced Administration tool that requires additional authorization and training prior to access.

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 or Terminate incomplete orders, or Delete open service change orders. Information and useful system notifications are provided throughout this area to assist trained and specially authorized Admins with Service Change tasks.



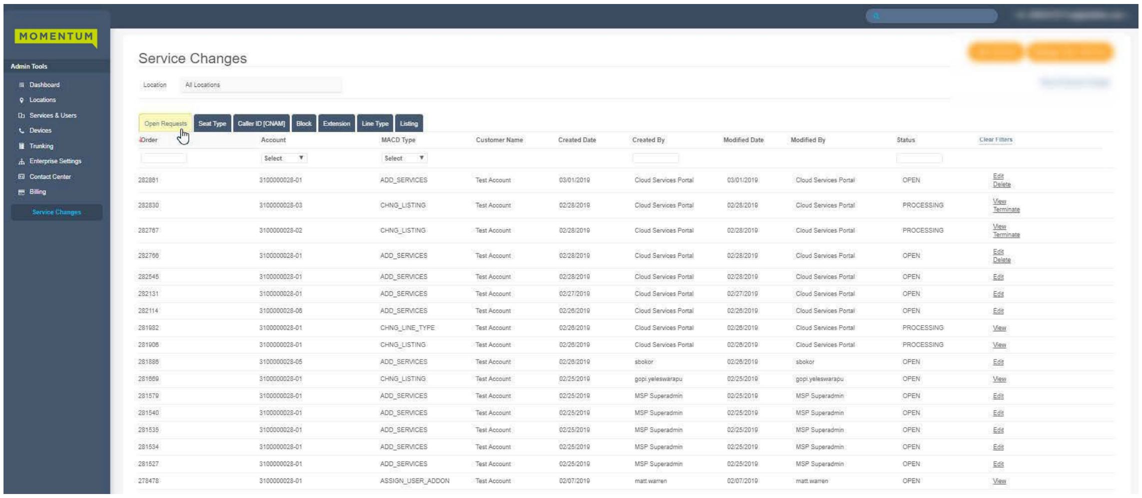
The primary Service Change tools listed at the top of the page include:

	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 the Open Requests tab for *All Locations*. Information is provided in a sortable table view. Tabs above the table offer access to all of the service change areas the Admin may access, and the tools to perform related actions and tasks.
The Change Management areas *can include* Seat Type, Caller ID [CNAM], Block, Extension, Line Type, Listing, Virtual Terminating Number, and IP Trunking Call Path.

Open Requests

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



The most recent Services Change order is displayed at the top. 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.

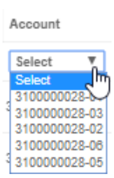
Filter Open Requests

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

Order Number

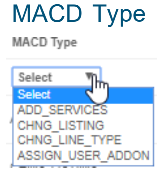
Type an order number or part of an order number to filter the list to show only matching items. The table will dynamically update, and filter further as matching numbers are entered.

Account



Select an account number option from the drop-down list to only show open requests for that account

MACD Type

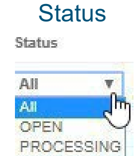


Select an available MACD (move, add, change) type from the drop-down list to show only the selected type in the table below.

Created By

Type a name or part of a name to filter the list by a creator. The drop-down also displays all service change order creators as selection options.

Status



Filter the list by selecting or entering a specific order status type – Open, processing, closed, etc.

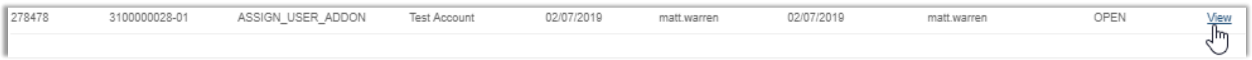
Clear Filters

Click the Clear Filters link above the columns (far right) to remove any applied filters and return to the default sort and display order.

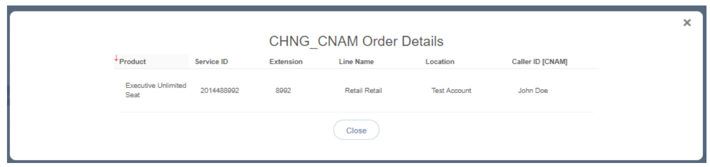
View a Service Change Order

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.



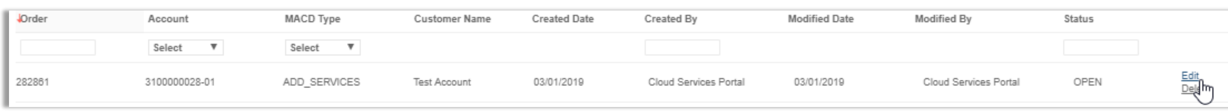
2. Click Close when finished to exit the dialog and return to the review the list of Service Change requests.



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.



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

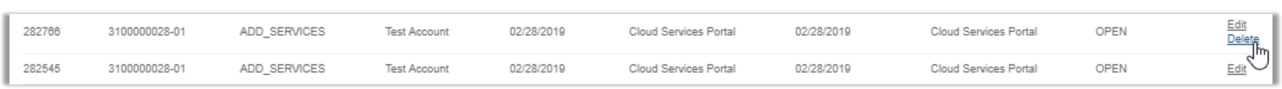
   Note: Each service change type requires specific information for configuration. The system will assist users and notify if any missing information is discovered during the auto-confirmation process it completes prior to allowing the order to be submitted.

3. Click Save when finished to submit the updates/changes for processing.

Delete a Service Change Order

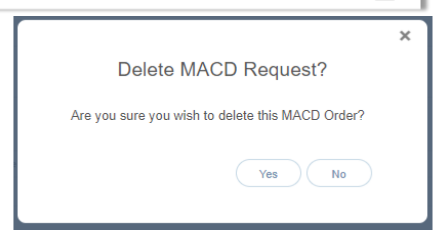
If a service change order can be deleted, the option to do so is provided.

1. Click on the Delete link adjacent to the desired item in the far right column.



2. Click Yes when prompted to confirm the action.

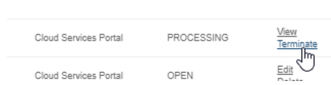
   The service change order is deleted, and the system updates the list of Open Requests. The history of the action is also recorded and may be reviewed by clicking on the View All Service Changes link at the top of the Service Changes section.



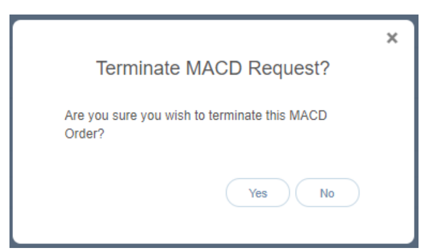
Terminate a Service Change Order

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.



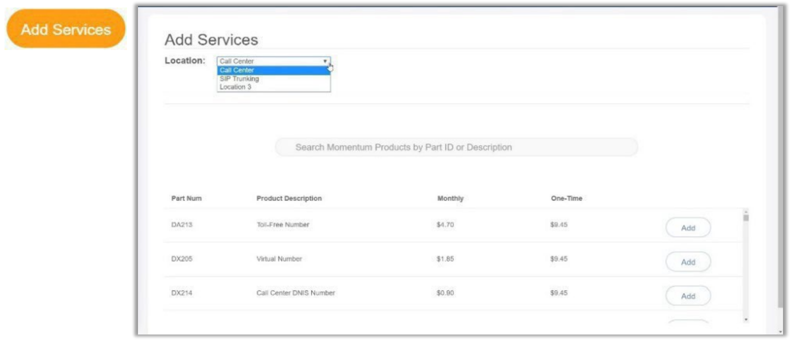
2. Click *Yes* when prompted to complete the termination.



It is important to note that while additional access to perform many self-management tasks is provided here, some order and change related tasks cannot be performed by a Customer Admin within the portal and contacting the Service Provider for assistance will still be required for those actions.

Add Services

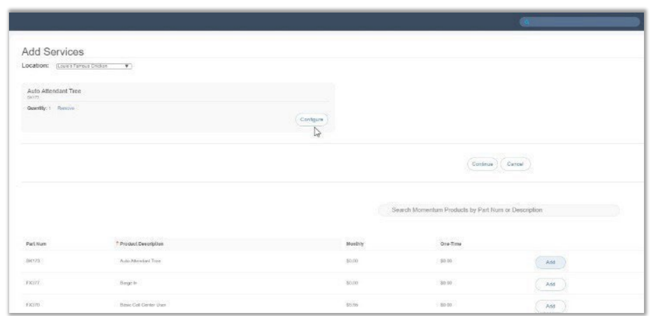
Specialized Authorization Required. Advanced access to create a new service order for a location on the account. New charges (recurring and/or non-recurring) that can affect billing will be incurred when adding products that have NRC/MRC charges.



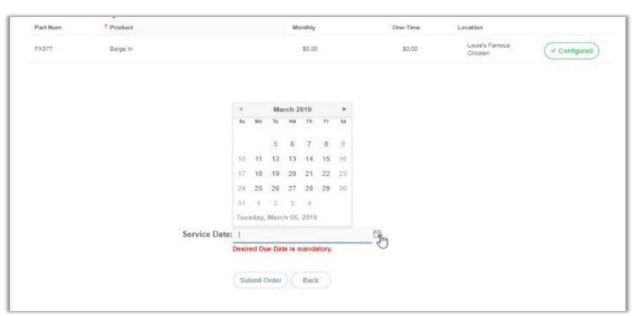
Pricing is listed and a full Price Book is provided to assist Admins.

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. Locate desired items via:
   a. The *Search* tool above the list.
   b. Scroll through the list.
4. Click the Add button adjacent to the desired item to select it.



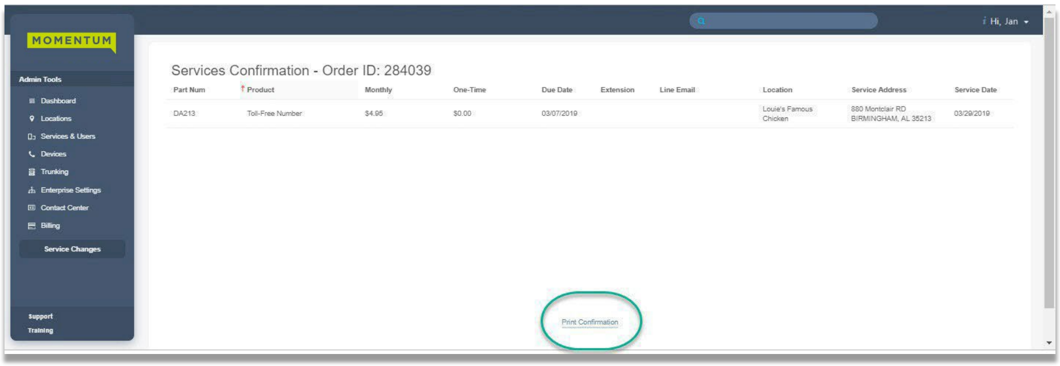
   The selected item is displayed at the top of the page to allow for *configuration*.
   Most service change types require specific configuration information in order to submit for processing. The system will assist users and notify when missing information is discovered during the auto-validation process it completes prior to allowing the order to be saved and/or submitted.
   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.*
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 display a Success! message or indicate that there is missing/required configuration information and provide an opportunity to revise and *Save* again.
8. Repeat steps 3 – 7 for any other services to be added to the location in this order.
9. Click Continue to proceed to order submission.
10. Enter or select a Service Date.
11. Click Submit Order when finished to send the new service order and view the *Order Confirmation* page.



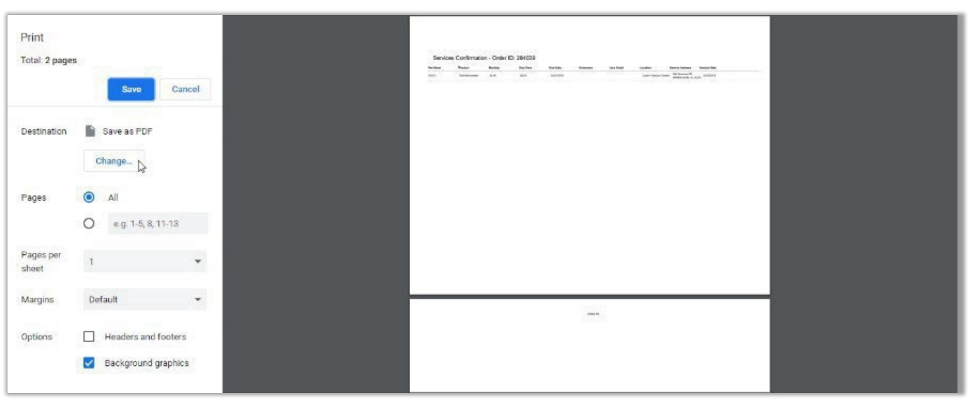
   During configuration, the system will note any current services or products that are inconsistent or incompatible with a selection, including those that already exist and do not need to be re-ordered, and inform the user if the order is not required.

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.

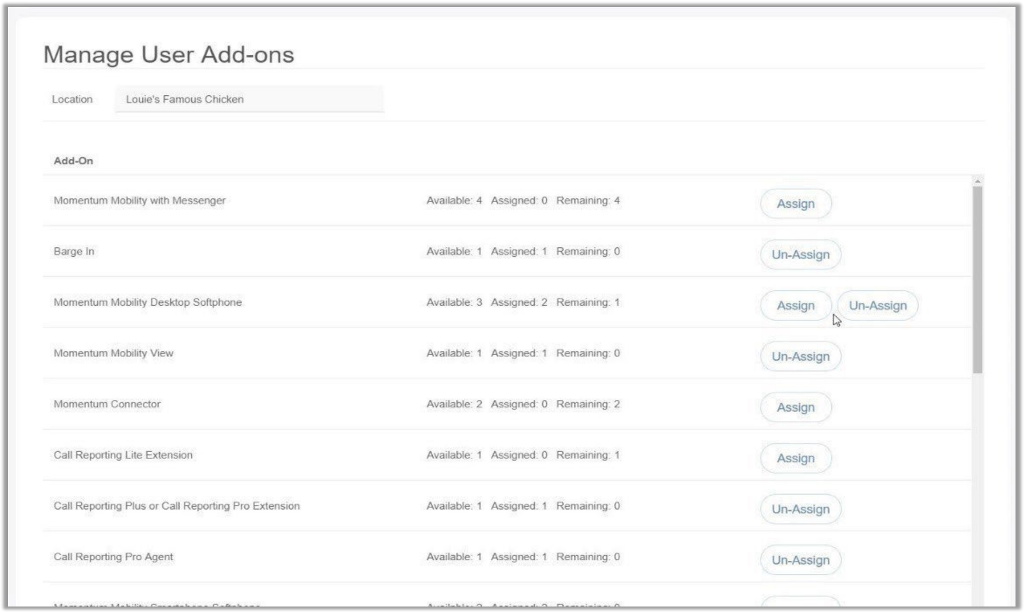


1. Click on the Print Confirmation link (bottom of the page) to open the Print dialog.
2. Accept the default settings (PDF, All pages, to local file…) to print all that is displayed per page, or select from the following print options:
   - Destination: Click Change to specify the print type and file location on your local system.
   - Pages: Specify the number or range of pages to print.
   - Pages per sheet: Specify the number of pages to print on each page, as needed.
   - Margins: Define new top, bottom, and side margins, 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

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.

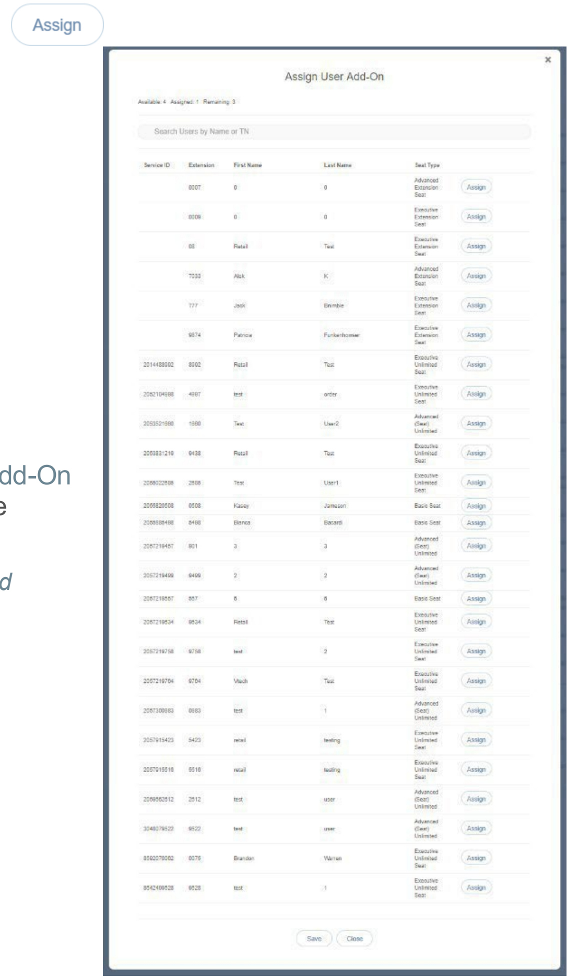


- This view provides access to lists of the current user add-on services.
- Filter the view using the Location selection tool at the top of the page (required).
- Each item in the list offers details that include:
- Add-On (service name)
- Available, Assigned and Remaining add-on counts
- Management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

Note: Any currently assigned User Add-Ons that may conflict with a new add-on must be *Un-Assigned* prior to a new Service Change request.

Assign a User Level Add-On

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



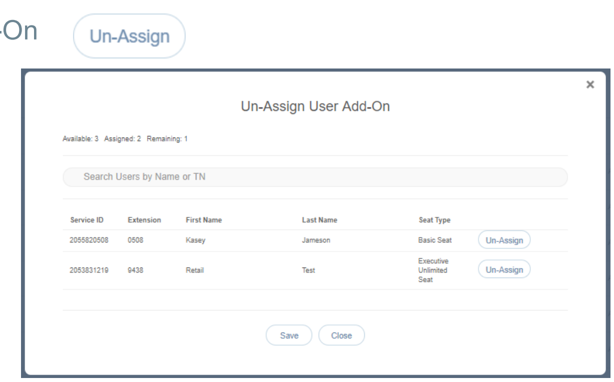
1. Click the Assign button adjacent to an Add-On (far right column).

   The list of available users with compatible services displays.
2. Use one of the following methods to locate the user(s) to be assigned the Add-On:
   - Scroll through the list to locate the appropriate user.
   - 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

The Un-Assign management tool becomes available for User Add-ons that have a count of 1 or more under the Assigned column.



1. Click on the Un-Assign button adjacent to an Add-On (far right column).

   The list of current Add-On Assignment(s) displays.
2. Click on the Un-Assign button next to the desired user to remove the assignment.
3. Repeat for any other users if there are multiple Add-Ons to be unassigned.
4. 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 to account for the User Add- On changes just entered.

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.

View All Service Changes

All Service Changes

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

Information for the Service Changes that have been made 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 ordernumber 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 the following administrative activities in this view:

- Sort – The column headers may be used to sort the data in ascending/descending alphanumeric 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*), MACD (change) 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 link options to View, Add, Delete, Terminate that are adjacent to each listing dynamically provide available actions based on the current status of the service change order.

View Service Change Order 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 Order

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).
4. Click Save when finished.

Delete a Service Change Order

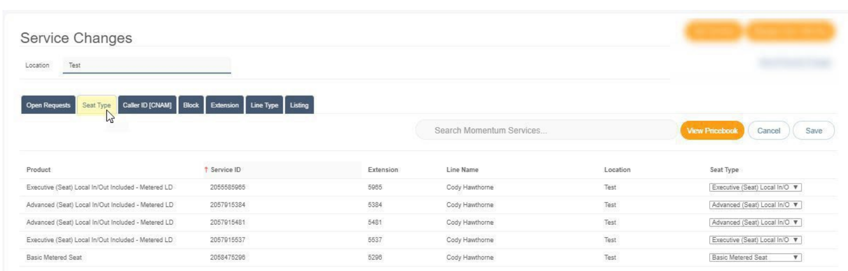
Use Caution: This action cannot be undone. This action is available to select when permissible within the process. Note: Completed orders cannot be deleted.

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

Seat Type

Change (upgrade or downgrade) seat types for lines in locations on the account. In this tab, Column headers may be used to sort the list alphanumerically by the column contents. A section Search tools 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.
The *Seat Type* column displays the current seat type and allows the user to select another type to order from the drop-down list.

Note: Recurring and/or Non-Recurring fees may be incurred by changes made here. A link to a copy of the Price Book is provided as a reference.

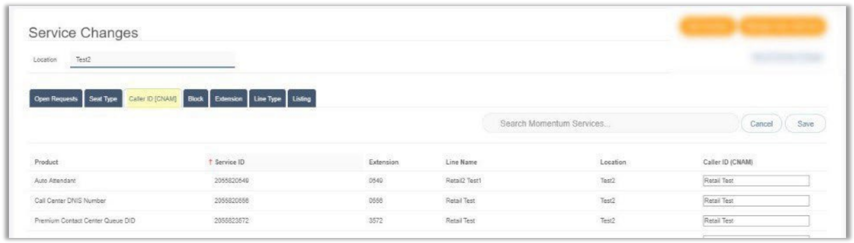


1. Click on the Seat Type tab to open the section for review.
2. Choose a Location.
3. Locate the user seat to be changed.
4. Seat Type: Click to choose from the drop-down list of available seat type change options for the selected user seat.
5. Repeat for any additional seat changes to other listings for the selected Location.
6. Click Save when finished to submit the Seat Type change request(s).

Caller ID (CNAM)

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.

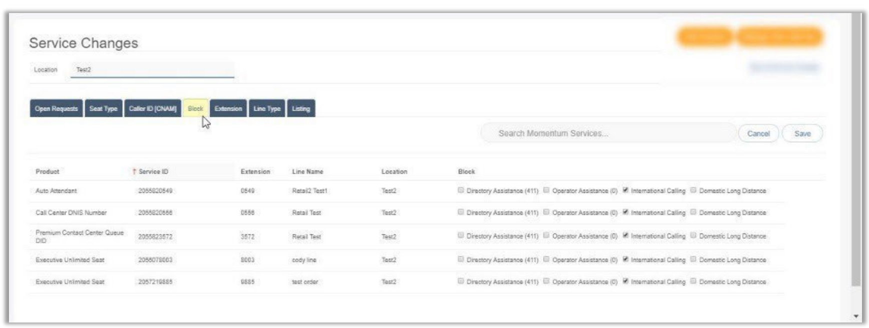
1. Click on the Caller ID [CNAM] tab.
2. Select the appropriate Location.
3. Select the service to be receive a CNAM change within the list.
4. Caller ID [CNAM]: Type the name to be displayed to call recipients when *Caller ID* is in use.



5. Repeat for any additional Caller ID [CNAM] changes to other listings.
6. Click Save to submit the changes for processing, Or to discard the changes, click *Cancel* and choose Yes when prompted to confirm the action.

Block

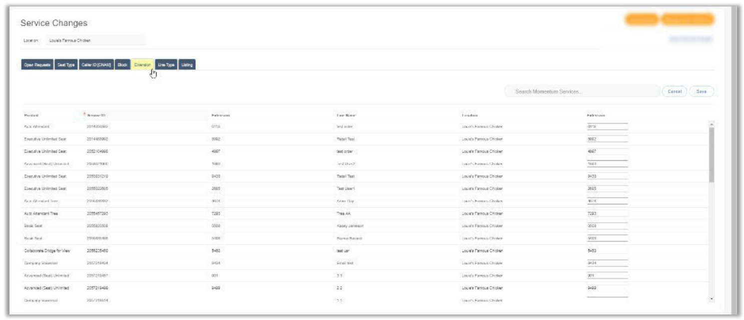
Manage/*change* settings that block specific call types from lines in each Location on the account. In this tab, Column headers may be used to sort the list alphanumerically.
A section search tool is provided to allow users to filter the list by entered terms.
The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, and Location. Simple On/Off check box 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. Block: Click within a check box 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. (Enabled by default)
   - Domestic Long Distance: ☑ Enable to block domestic long-distance calls from the line.
4. 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.

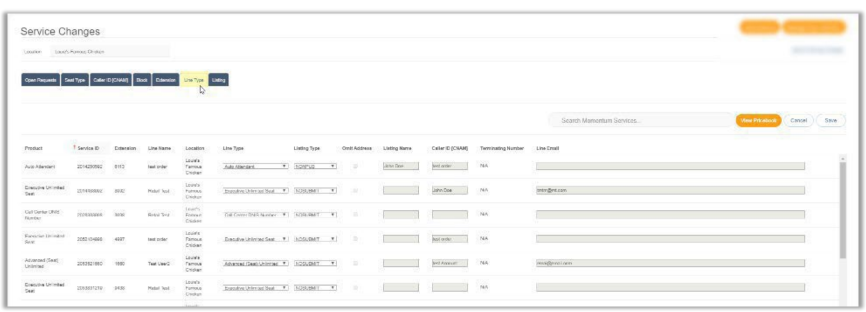


1. Click on the Extension tab.
2. Select a Location at the top of the page to view the assigned lines in a simple table format.
3. Locate the item to be changed.
4. Type a new extension number in the Extension field adjacent to the item in the far-right column.
5. Repeat as needed for other lines.
6. 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.

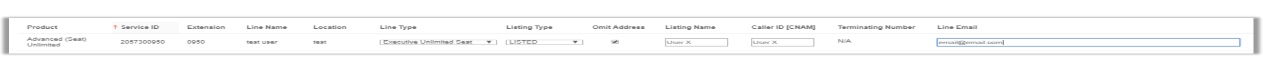
Line Type

Manage/*change* line type assignments for services assigned to locations on the account. The data in this section is listed in a simple table format. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, and Location. A section search tool is provided to allow users to filter the list by entered terms. Column headers sort the list alphanumerically. The editable fields update dynamically based on previous selections. Be aware that a short loss of service may also occur when Line Type changes are made. Ref: Seat Type.

Note: Recurring or Non-Recurring fees may be incurred by changes made here. A link to a copy of the Price Book is provided as a reference. Service changes here may also be subject to a short loss of service while the number is reconfigured in the switch. Devices sharing call appearance may auto-reboot or require a manual reboot after the update. Recommended: Use the Seat Type tab to upgrade or downgrade seat types to avoid loss of service.



1. Click on the Line Type tab to open the section for review.
2. Select a Location at the top of the page to view assigned lines in a simple table format.
3. Locate the line to be changed.
4. Select or define the following as needed to change the Line Type settings:



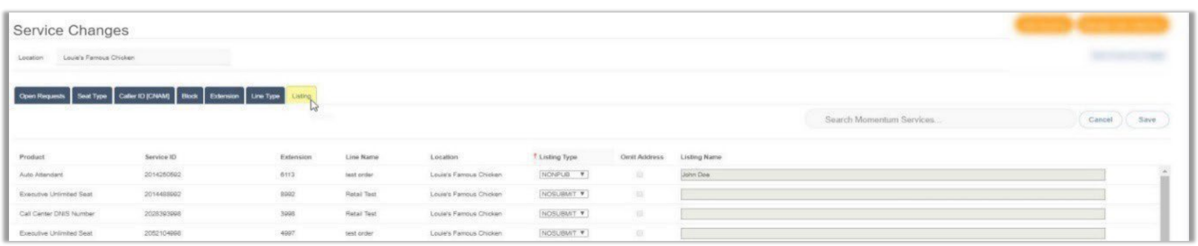
- Line Type: Select a new Line Type from the available options in the drop-down. The other listing fields also become available for edit.
  Note: If there are User Add-Ons assigned, the system notifies the user that they must be Un-assigned prior to a Line Type change.
- Listing Type: Select an option in the drop-down once changes are made to the Line Type. Options include LISTED, NONLIST, NONPUB and NONSUBMIT (default)

- ☐ Omit Address: Available for edit when *Listed* is selected for the *Listing Type*. Click to place a check mark in the check box ☑ to omit Address in the listing.
- Listing Name: Type the assigned name to be displayed for the service.
- *Caller ID [CNAM]*: Type the name or term used for outgoing Caller ID (displayed to receivers).
- Terminating Number: Used with Virtual Number Line Type. Enter the 10-digit number (no spaces or special characters)
- Line Email: Enter the full email address (e.g., name@email.com).

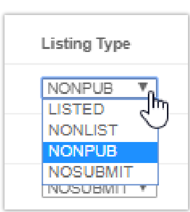
5. Click Save to submit the change(s) for processing - Or click Cancel and confirm to discard changes.

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 usable 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.



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 Listing option edit fields, as needed:
   - Listing Type: Choose from:

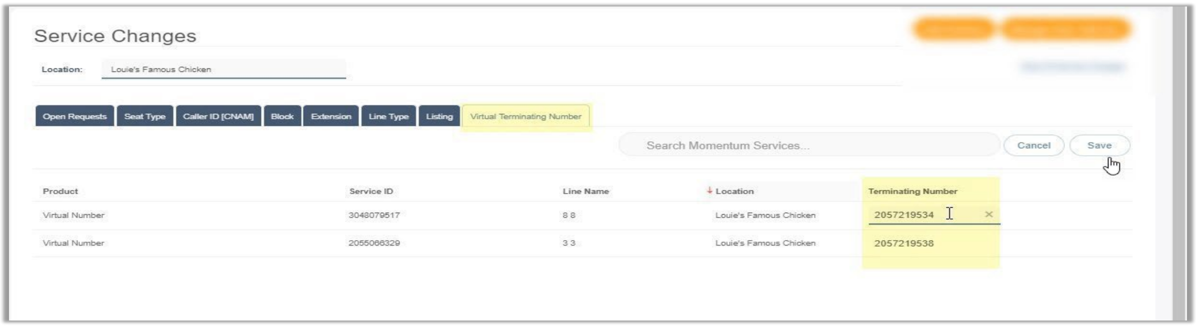


- LISTED – Select to enter information and list.
- NONLIST – Select to enter information but not include in directory listings.
- NONPUB – Select to enter information but not include for publishing.
- NOSUBMIT – *Default. Read-Only*. Select another Listing Type to make changes.

   - Omit Address: Click to place a check mark in the box to <u>omit</u> the 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)

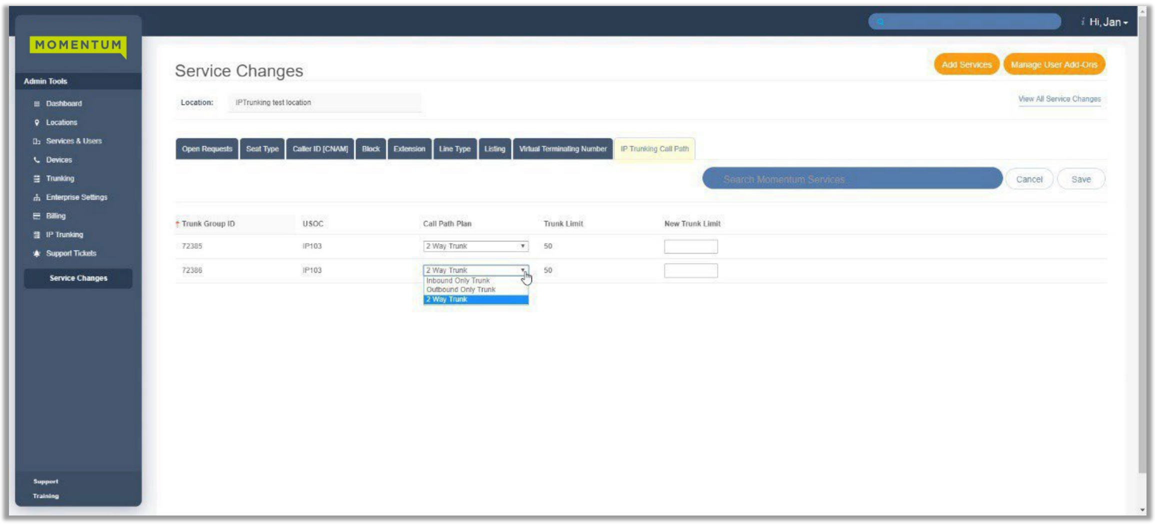


1. Click on the Virtual Terminating Number tab in the Service Changes page.
2. Select a Location from the drop-down list at the top of the page. *The list for the location displays.*
3. Identify the correct virtual number line within the table. *The Search tool and column headers are available to assist 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.

IP Trunking Call Path

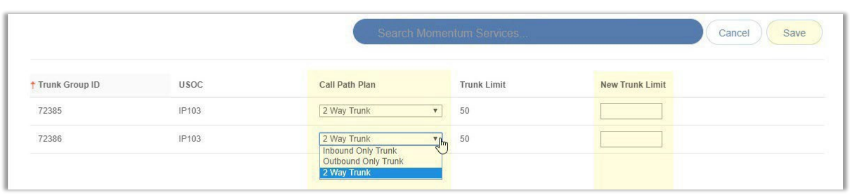
If specialized Trunking is in use within the organization's system, Authorized Admins may see the **IP Trunking Call Paths** tab in the **Service Changes** section. This area provides tools to modify the Call Path Plan and Trunk Limit settings for each Trunk Location.



1. Click on the IP Trunking Call Path tab. 

2. Select a Location from the drop-down menu at the top of the page. 

   The list for the selected location displays.
3. Identify the correct Location within the table.
   The Search tool and column headers are available to assist in sorting or filtering the list.
4. Once the Location has been identified, make changes to the following fields, as needed:
   - Call Path Plan – Click on the drop-down menu to select a new plan option.
   - New Trunk Limit – Type a new amount in this field to update the trunk limit (whole numbers only – no special characters or spaces).



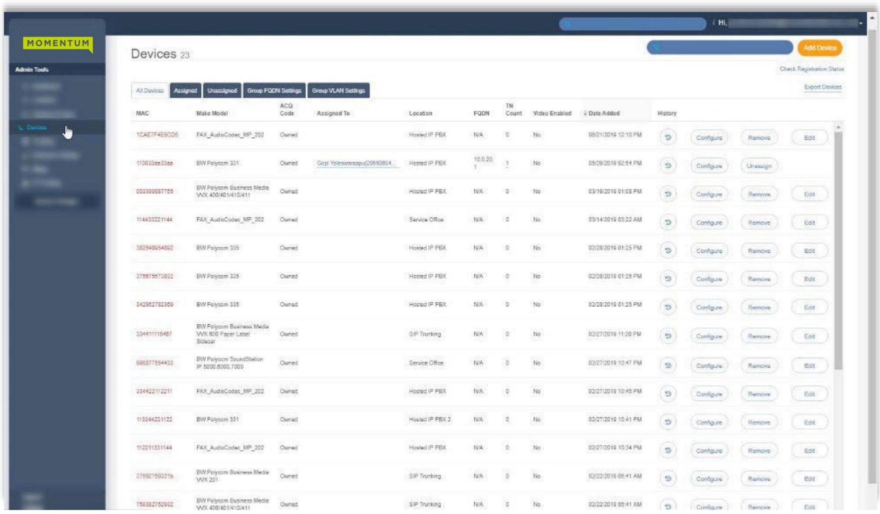
5. Repeat as needed to update any other Trunk Groups listed under the selected Location.
6. Click on the Save button to submit the change request(s).

   The information for this change request 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.

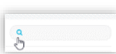
*DEVICES

Restricted Access - Provider Level.
Specially trained and authorized Administrators may be granted permission to work with these advanced tools.

The Devices section offers a searchable table list view of All Devices, as well as individual lists of the Assigned and Unassigned devices. These will only display if they have been added into the *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. Function icons to the right of each device listing offer access to review the device's activity History, Configure the device (where allowed), Unassign the device, Edit unassigned device inventory data, or Remove an Unassigned device.



Section Search



Locate data found within the table view below.

Add Device

Add Device

The Add Device 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.

Export Devices

Export Devices

The Export Devices link downloads a .csv spreadsheet containing the list of devices and their current settings for review or reporting.

Tab Views

Click a tab to review listed information for All Devices, Assigned or Unassigned Devices, and Group VLAN or FQDN Settings

Column Link(s)

Assigned To and TN Count links provide access to review the device's assignments/numbers and link to the *Services & Users* page listing.

History

Provides access to review the entire history of activity for the selected device.

Configure

Configure

Opens a new view where the user may define or edit the configuration data for the selected device.

Check Registration Status

Poll NEPS / BroadSoft and update registration information.

Unassign

Unassign

Allows authorized users to delete the current assignment for a device, or un-assign <u>and</u> remove the device from inventory.

Remove

Remove

Delete unassigned devices from inventory.

Edit

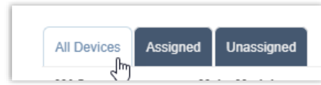
Edit

Modify unassigned device inventory data.

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.

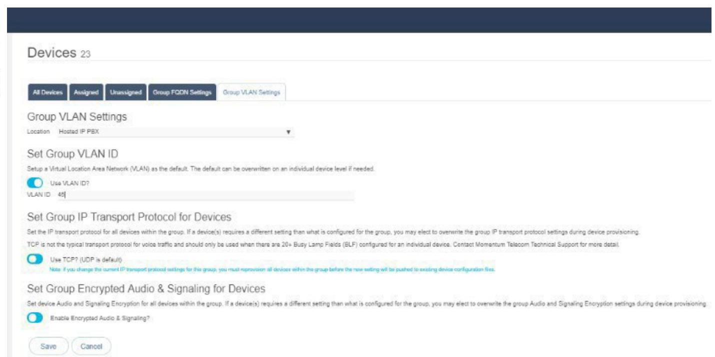
1. While in the Devices section, click on a tab at the top of the page to view related lists of devices in inventory (if any) and to access the inventory management tools for those devices.



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 or more 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

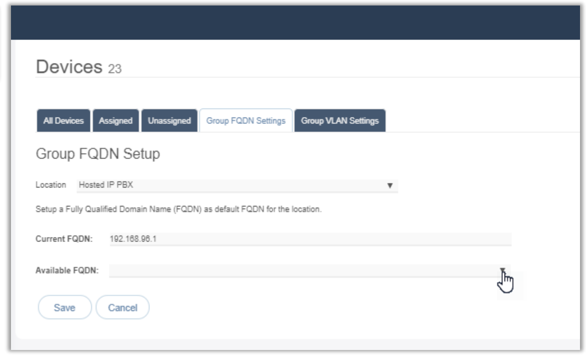
Enable Encrypted Audio & Signaling? On/Off setting.

Click to slide the toggle to ON as needed for usage.

4. Save - Click 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:

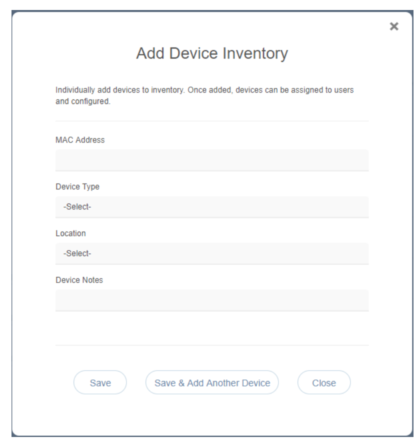


1. Click on the Group FQDN Settings Tab.
2. Location - Choose a location option from the drop-down menu list.
3. Current FQDN – Read Only. Displays the current default FQDN assignment.
4. Available FQDN – Click within the field to open the drop-down selection list and choose an option from the FQDNs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

Add a Device

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
   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

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 format (comma-delimited) for reporting or distribution.

View Device Activity History

The History column of the Devices page offers 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

Check Registration Status

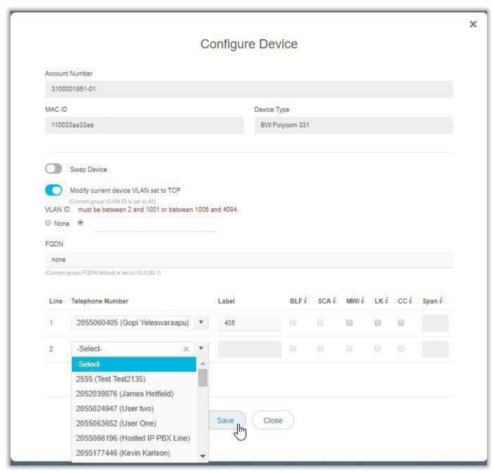
The Check Registration Status link (top right of the main Devices page) polls NEPS and BroadSoft for the latest registration information and updates the devices in the list with that new data, as needed. The date and time of the latest check is displayed to Admins. This database review and update process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

Configure a Device

Configure

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.

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

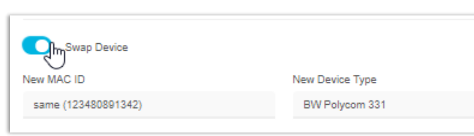


While working in Devices:

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

Swap Device

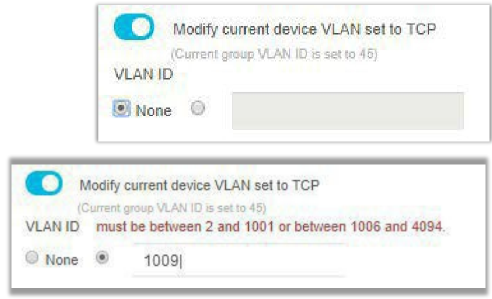
While working in Configure Device:



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.

Modify Current Device VLAN Set to TCP

While working in Configure Device:



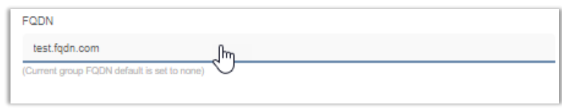
1. Click to toggle the switch to Enabled.
2. OR - Click the setting toggle to disabled
3. Click to set to None (default), or
4. Click to enable and Enter a VLAN ID in the field (must be between 2 and 1001 OR between 1006 and 4094).

Where in use, the current Group VLAN ID default is provided as a reference. In this example the current Group VLAN ID is 45.

5. Click Save to update the information, OR – Click Close to exit the dialog without making changes.

Set Device FQDN Assignment

While working in Configure Device:

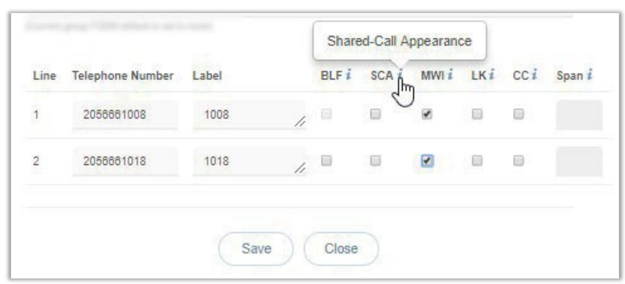


1. Click within the FQDN field to select from the available *Fully Qualified Domain Name* options in the drop-down list.
2. Click Save to update the information, OR – Click Close to exit the dialog without making changes.

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 – Select a ten-digit telephone number 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 check box to enable *Busy Lamp* Field (presence information) for any secondary line(s).
- ☑ SCA – Click to place a check in the corresponding check box 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 check box to enable *Message Waiting Indicator* on the line. Recommended.
- ☑ LK – Click to place a check in the corresponding check box to enable *Line Key Span* on the line.
- ☑ CC - Click to place a check in the corresponding check box 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.

Modify Device Configuration

While working in Devices:

1. Select a device within one of the Device Tab lists.
2. Click the Configure 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.

Reboot a Device

While working in Devices:

1. Select a device in the list.
2. Click on the adjacent Configure button for the listing.
3. Make any changes needed to device configuration.
4. Click Save to submit the new configuration data.
5. Click the Reboot Device button.

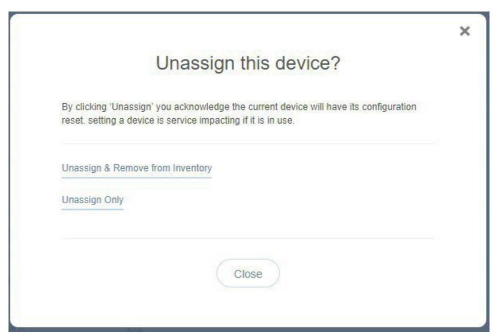
   The device is directed to reboot and update configuration data.

Unassign a Device

While working in Devices:

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

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



Unassign Only

1. Where available, 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.

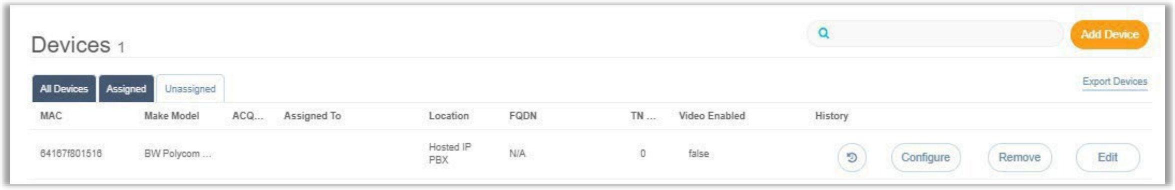
Unassign and Remove a Device from Portal Inventory

Use Caution. This action cannot be undone. The device will be removed from active inventory and once the configuration is updated, will not function within the network unless re-Added, configured, and assigned again.

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.

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.



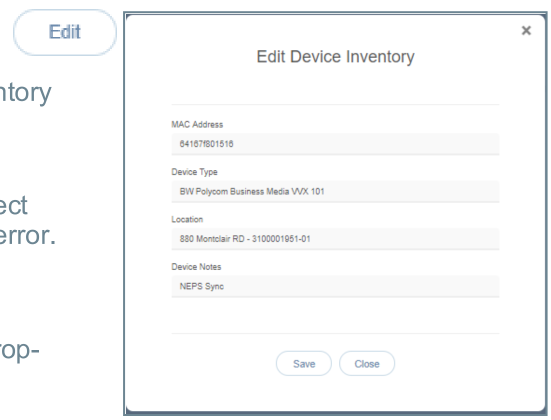
The additional tools include:

Edit – Select this button to edit the device inventory information before configuring and assigning it.

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, and Location assignments).

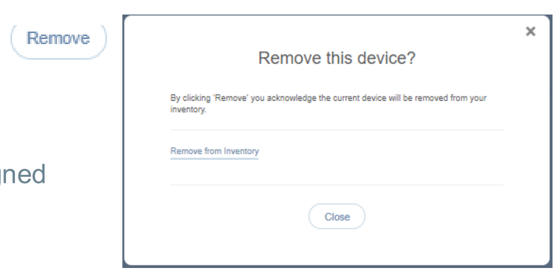


While working in Devices:

1. Select an Unassigned device in the list.
2. Click the Edit button adjacent to it to begin editing the inventory information.
3. Select or specify the following:
   - MAC Address – Enter or Edit the MAC Address. Correct formatting information is provided if data is entered in error.
   - Device Type – Select the correct device type from the drop-down list of options.
   - Location – Select the correct Group/Location via the drop-down list of options.
   - Device Notes – Enter short notes about the device.
4. 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 Portal Inventory

Use Caution. This action cannot be undone. The device will be removed from active inventory and once the configuration is updated, will not function within the network unless re-Added, configured, and assigned again.



While working in Devices:

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

For assigned devices, Ref: *Unassign and Remove a Device from Portal Inventory*

SUPPORT

The Support option in the *Menu* panel (and in the quick access drop-down menu at the top of the screen) opens the Support page. In general, this page lists optional features or links to information.

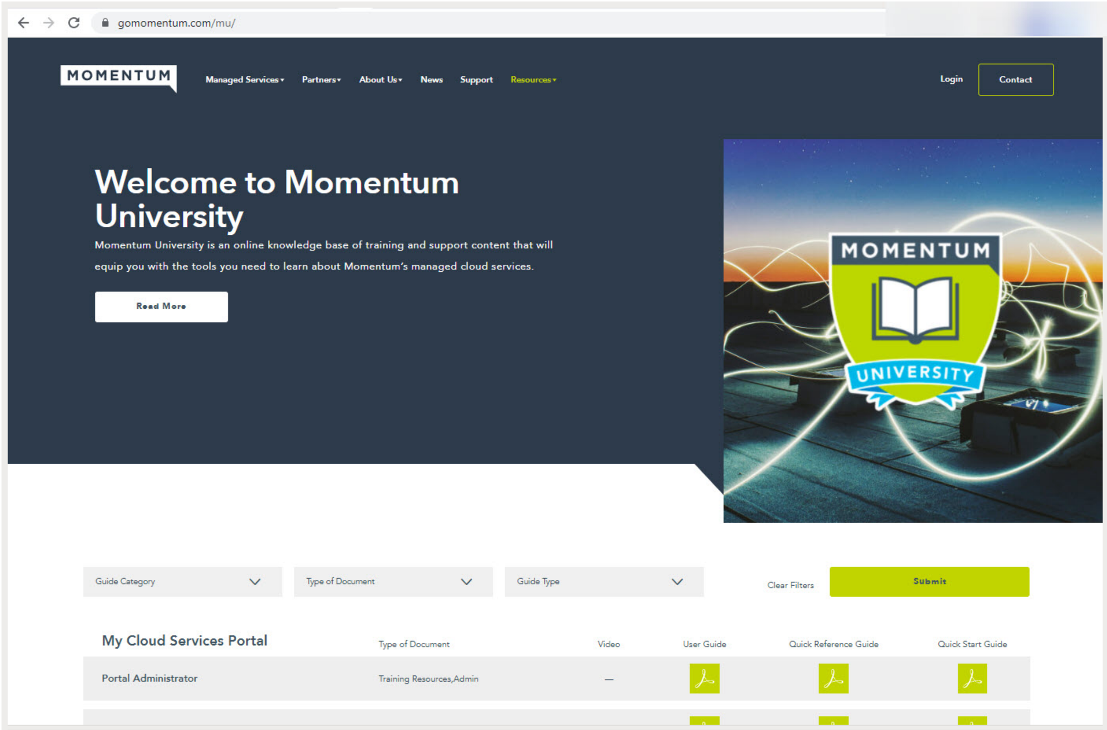
TRAINING

The Training option in the Menu panel (and in the quick access drop-down list at the top of the screen) opens the Momentum University library in a new web page.

This web page on the Momentum Telecom website offers links to useful Momentum University where documentation, information, and videos about Momentum products and services are made available to customers 24/7.

The My Cloud Services Portal section offers comprehensive documentation to help you work in the portal, or to download copies of the documentation for future use.

Please note, all documentation and resources provided in Momentum University are updated frequently to keep the information up to date - so check back often.



Contact Us

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, service upgrades, and any other general inquiries you may have.

Simply contact us and a representative will help you with your request.

Support by Phone

General Line

1.888.538.3960

Live phone support is available 24/7 for speedy assistance and issue resolution.
Calling Customer Care is the fastest way to get help when you need it.

Important: In order to provide *optimal* support, we recommend that the Account Owner or an Authorized Contact submit a ticket or contact us via our toll-free support number (above) regarding any critical issues that may require quick troubleshooting for resolution. And always keep your Momentum Telecom account number handy to help us better assist you when you need us.

Online Support

GoMomentum.com/support

Online options are provided to access Customer Support quickly and easily, including contact information and helpful tools to submit a support request ticket. For fast resolution, include the issue, details of your efforts to resolve (if any), methods to reproduce the issue, along with your account number and contact information.

User Documentation

GoMomentum.com/MU

Momentum University is an online library of training and support resources that will equip you with all you need to learn about Momentum's best-in-class cloud services and their features. This library includes frequently updated product user guides, FAQs, quick reference tools, tips, videos, and more - and it is always available for you to reference on the Momentum Telecom website.

Check Momentum University often for the latest product information and helpful resources.