Quick Reference Guide

My Cloud Services Portal Voice Admin

MOMENTUM

Sign In

To Access the Admin Tools Area Within My Cloud Services Portal:

Go to https://portal.momentumtelecom.com and enter your Administrator Username and Password credentials to Sign In.
During the sign in process, MFA verification may be required and Terms and Conditions may need to be acknowledged.

Admin Tools Menu

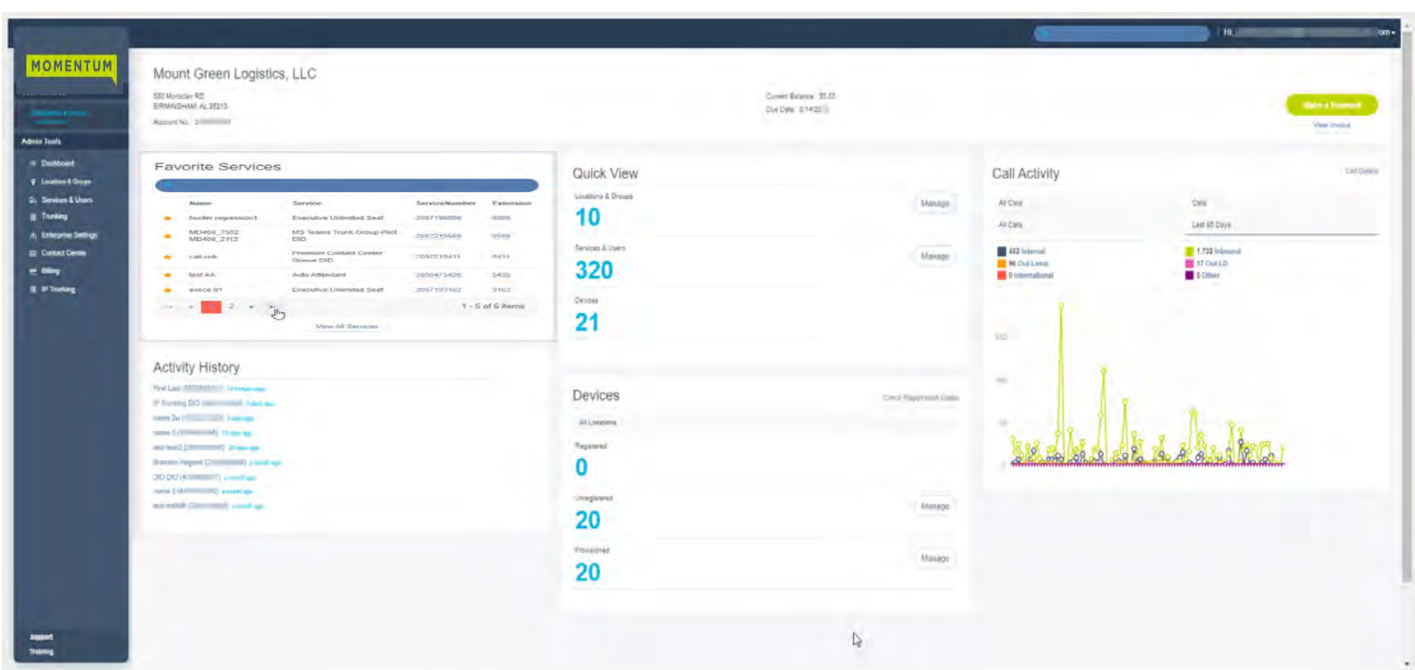
The Admin Tools Menu on the left side of the dialog offers permission-based access to useful administration sections.
Only sections related to services on the Organization's account can be displayed in this area.

- Dashboard - The home page for Administrators offers useful information and filtered access to useful sections of the Cloud Services Portal
- Locations & Groups - Location and Group level feature management
- Services & Users - User Account list and access to individual user settings
- Trunking | *IP Trunking | *Enterprise Trunking - Review and manage basic or specialized trunking settings based on the organization's setup.
- Enterprise Settings - Manage enterprise-level services and features
- *Contact Center - Contact Center customers. Administer Contact Center setup
- *Microsoft Teams - Teams Admins Only**.** Advanced Teams initial deployment and general User TN / Routing assignment management tools
- *Call Recording - Call Recording customers only. Manage basic voice settings for Call Recording licenses holders
- *Webex - Webex customers only. Search for and review the self-activation process status for users who are assigned Webex licenses
- *Circuits | Service Locations - For data customers. Review basic circuit or networking performance
- *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
- *Service Changes - Provider-Level Access. Advanced billing-impacting service change order management tools. Requires additional training
- *Support Tickets - Restricted Access - Permissions and authorization required to view and/or use the tools for communications with Customer Care

** Restricted access sections that require additional authorization for each Administrator.*

Voice Admin Dashboard

The Home page for Administrators. The Admin Dashboard provides at-a-glance views of *Live* and historical account activity, AND direct **filtered** quick-access links from each card section to the administrator-level tools, services, and feature pages found in the menu on the left. Now you can see and track everything that is going on and access any area or service you need to manage from one web page - *fast*.

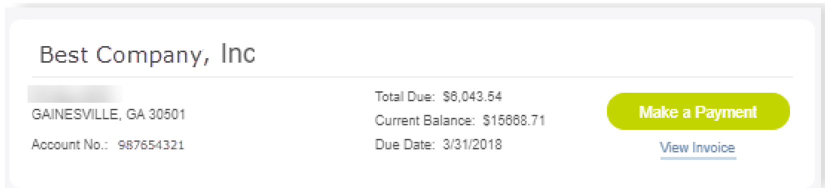


VOICE ADMIN DASHBOARD FEATURES

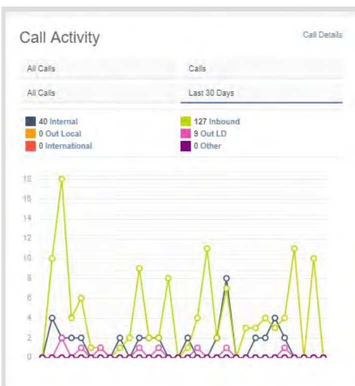
The Dashboard section cards offer LIVE and historical data along with easy access to common administration tools. All Dashboard features and menu items require sufficient authorization or permission to view and use.

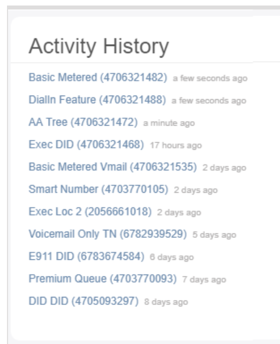
Account Profile - Review current account information. Authorized Billing Admins can see the latest invoice, pay the current bill, and access the Billing history. *Admins without Billing access permissions will only see the Profile information in this section.*

Links to: Billing



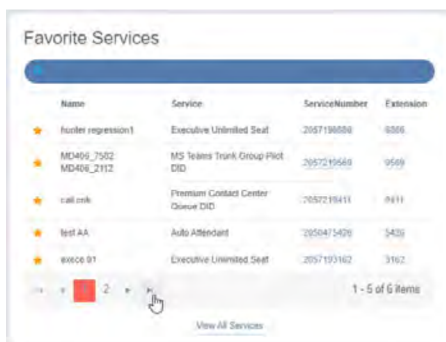
Call Activity - A quick graphical view of call data, with tools to filter the view, useful 'mouse-over' details within the graph display, and access to open and filter your call logs for reporting.





Activity History - Shows recent Administrator-level activities and provides quick access links to review the account or service shown in the list.

Links to: Direct links to Dashboard of the accounts or services listed here.

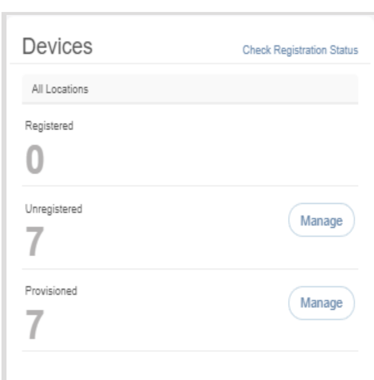


Favorite Services - Locate accounts set as favorites ★ for constant quick Dashboard access. Use the Search (top) or pagination tools (bottom) to find accounts you've set as Favorites.

Links to: The Services & Users page and to the selected User's Dashboard for account management.

Devices - Current counts for registered, unassigned, and provisioned devices, and the ability to filter by Location, check registration status, and access device assignments.

Links to: Services & Users



Quick View - Total number of Locations & Groups, Services & Users, and Devices. Information is based on the Admin's access permissions.

Links to: Filtered views of Locations & Groups and Services & Users

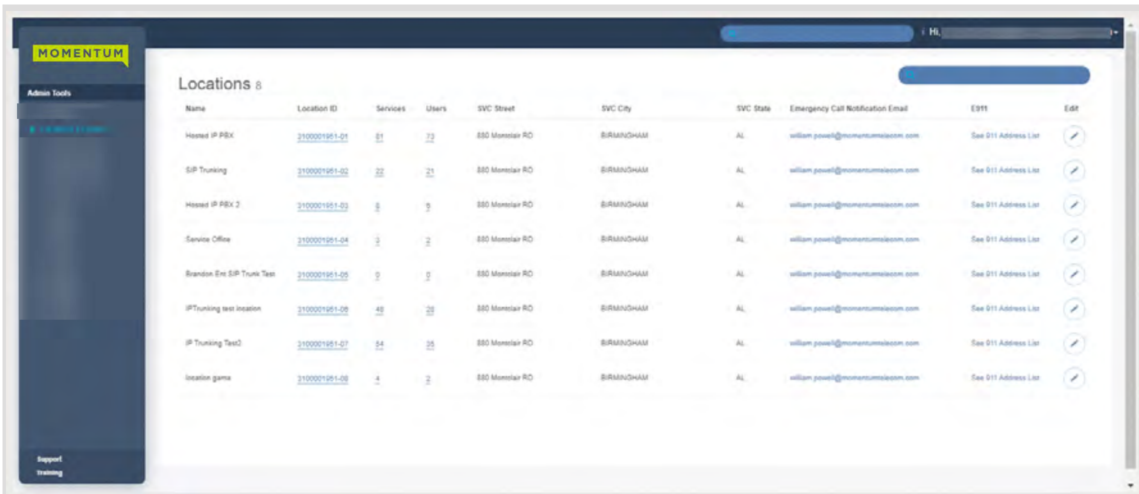
Note: Additional dashboard sections may display information or tools for optional or advanced permissions sections of the Cloud Services Portal if they relate to services on the Organization's account and the Administrator has been granted sufficient access permissions for any of those areas.

LOCATIONS & GROUPS

Review and manage settings for the Users and Groups that are assigned to Locations.

The Locations page provides a searchable table listing of the Locations currently configured on the account. Authorized Admins may use the Section Search to locate specific terms within the table, use the column headers to sort the list alphanumerically, and access the following areas for each Location listed on the page:

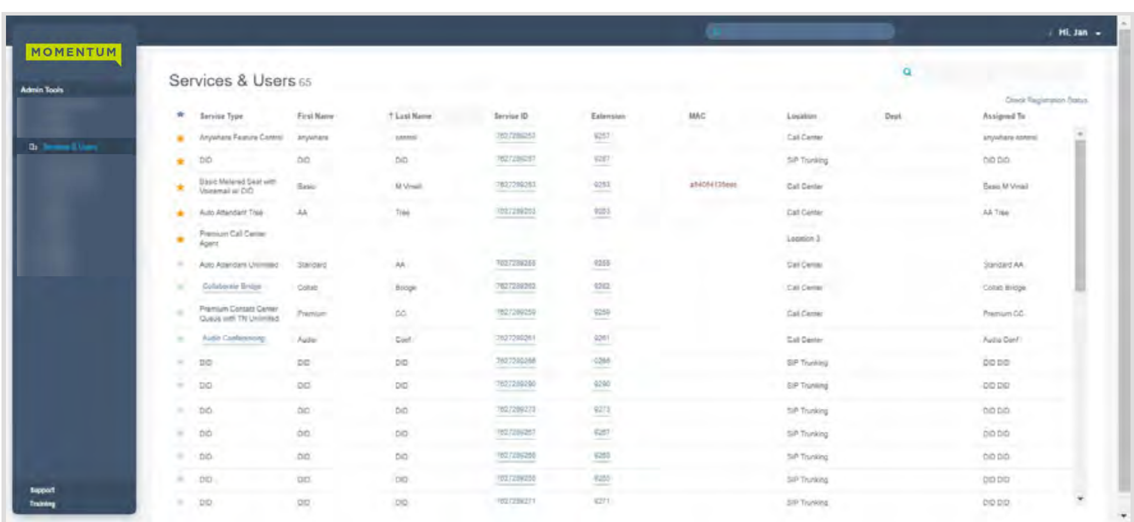
- Location ID, Services, and Users - Click on the number displayed for a Location in these columns to open the related list within the ***Services & Users*** page.
- Links to review and manage the Emergency Call Notification Email and See 911 Address List for each location.
- Edit icon (far right column) opens the ***Group Settings*** dialog for the selected Location.



SERVICES & USERS

Review and manage feature settings for individual users and services on the account.

Services & Users displays a searchable and sortable list of the user accounts currently defined on the account. The information is provided in a simple table format, and includes the Service Type, Name (First,Last), Service ID, Ext (Extension), MAC (Address), Location, Department and Number Assignment for each user, where defined. Links in the columns take users directly to the related area of the site where editing or review of filtered data may be performed. Admins may also select specific listings to display as Favorites ★ on the Dashboard for quick access to accounts that they manage frequently.

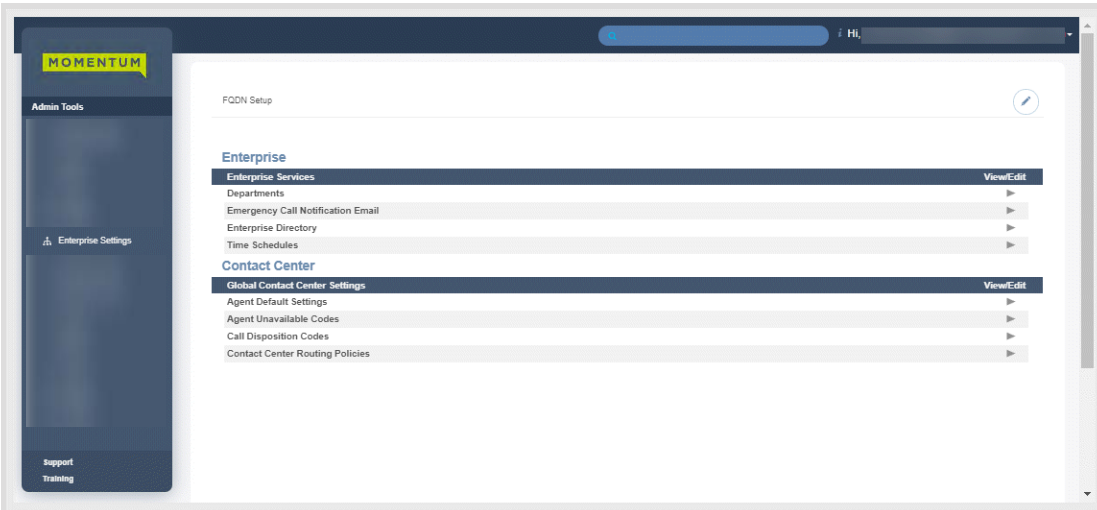


ENTERPRISE SETTINGS

Manage the Enterprise (global) level settings and features.

The **Enterprise Settings** menu option opens the ***Enterprise*** (global) level default feature settings for review and edit. These may include the Global Enterprise Services settings (Departments, Directory, and Time Schedules), and the Global Contact Center settings (Agents, Unavailable Codes, Disposition Codes and Routing Policies).

- View/Edit The drop down arrow ▶ next to an item opens the *Edit Settings* view.

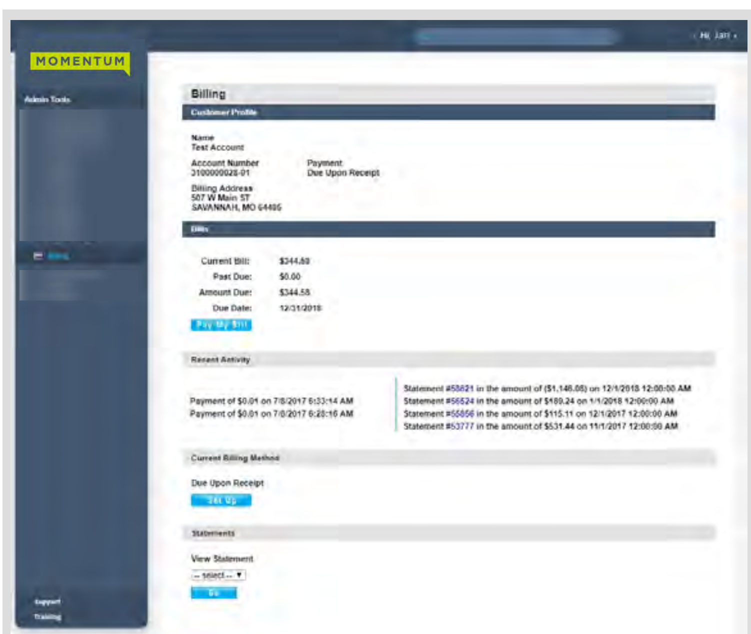


*BILLING

Restricted Access. Authorized Admins may review and manage account billing information and payments.

The **Billing** page displays current account and balance history information (at the Enterprise or - where enabled -at the Location level, with easy access to the tools that allow Admins to review and manage statements, edit the billing payment method information, setup routine monthly payment schedules, and even immediately pay the current bill when necessary. Billing tools include:

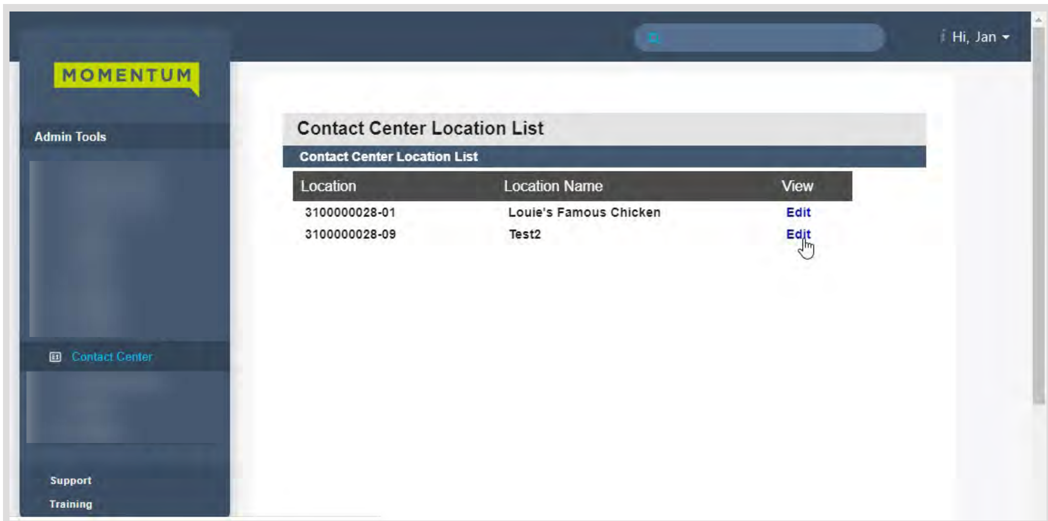
Pay My Bill • Billing Method Setup • View Statements



CONTACT CENTER

Contact Center management tools for activation, setup, and feature configurations.

The **Contact Center** page provides authorized Admins with full access to manage their Contact Center feature configurations and overall settings. This section shows the current Status, Name, Type, Phone Number, and Ext(ension) within a searchable list. Each Contact Center listing offers access to **Edit** its default setup and **Configure** individual feature settings.

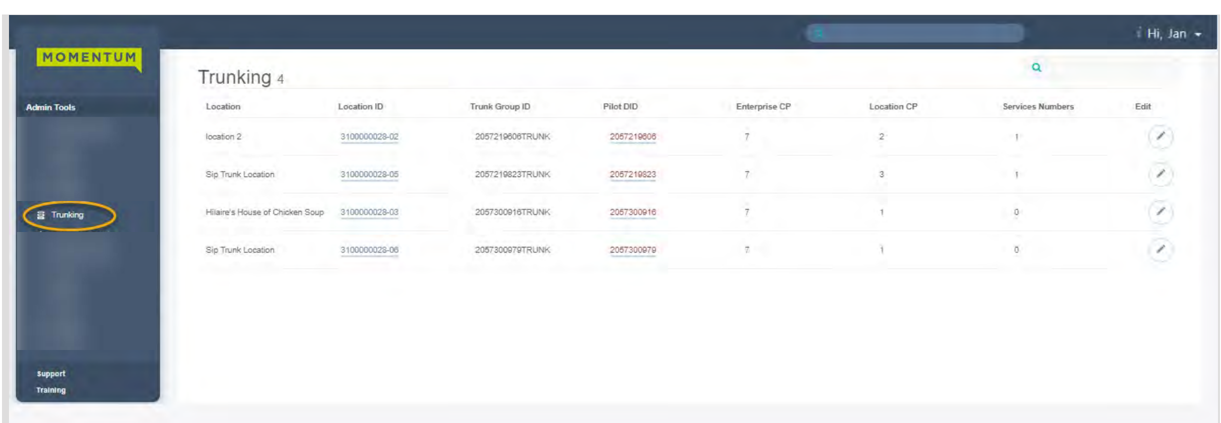


TRUNKING

Access for IT Admins to review and manage basic SIP Trunking settings.

The Trunking page allows authorized Admins to review current SIP Trunk settings for the account. The page prominently displays a sortable and searchable table listing the trunk group(s) with Location Name and ID, Trunk Group ID, Pilot DID, Enterprise Call Path, Location Call Path, and Service Number.

- Location ID - Links directly to the ***Services & Users*** page to review or modify individual assignments.
- Pilot DID - Provides a color code health indicator (Red = Issue) and links directly to the ***Services*** dashboard.
- Edit - The Edit icon opens the ***Group Settings*** page for administration of the SIP Trunk defaults.

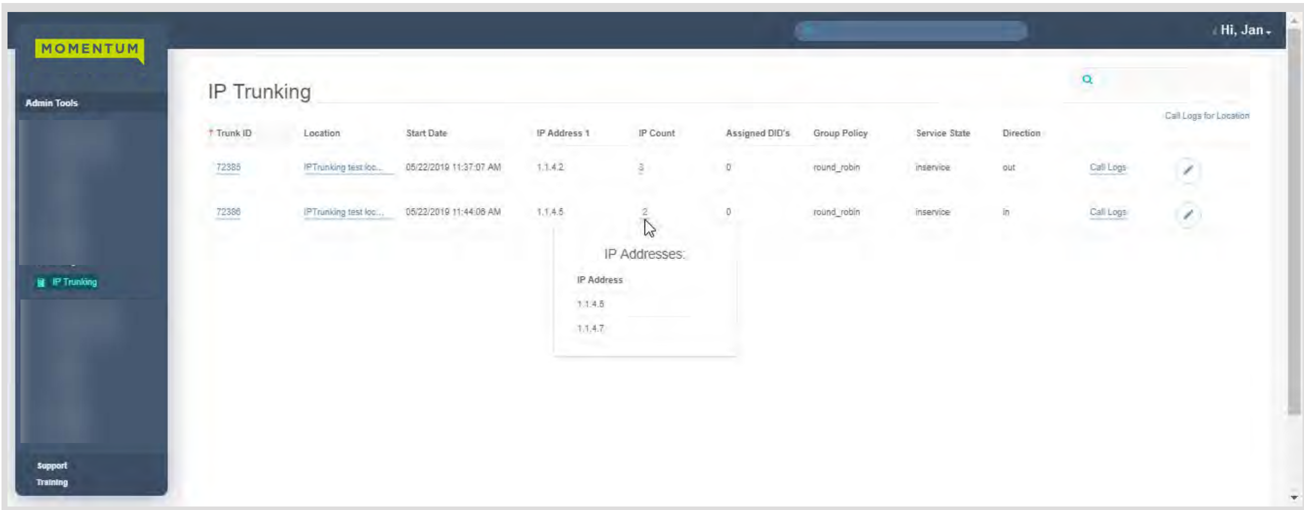


*IP TRUNKING

Advanced Access for IT Admins. Review and manage specialized IP Trunking information and settings.

For those organizations using **IP Trunking**, this page displays current and historical IP Trunking information, with easy access to the tools that allow authorized Administrators to manage IP Trunking location settings and create call log reports. IP Trunking tools include:

View/Edit Trunking Location Settings • View Call Logs • Create Call Log Reports

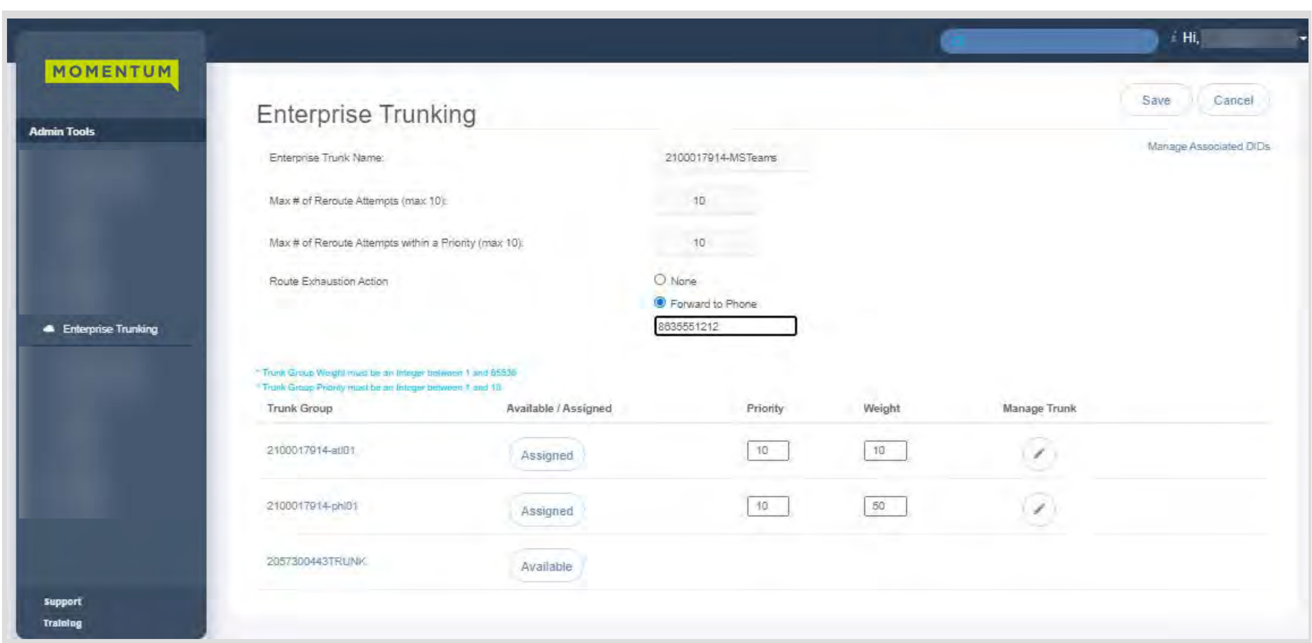


*ENTERPRISE TRUNKING

Advanced Access for IT Admins. Review and manage Enterprise SIP Trunking settings for the account.

The **Enterprise Trunking** page provides access to the tools that allow specially trained and authorized Admins to manage and maintain specialized Enterprise trunk group settings.

View/Edit Trunk Group Settings • Manage DID Associations • Manage Routing/Priority/Weight



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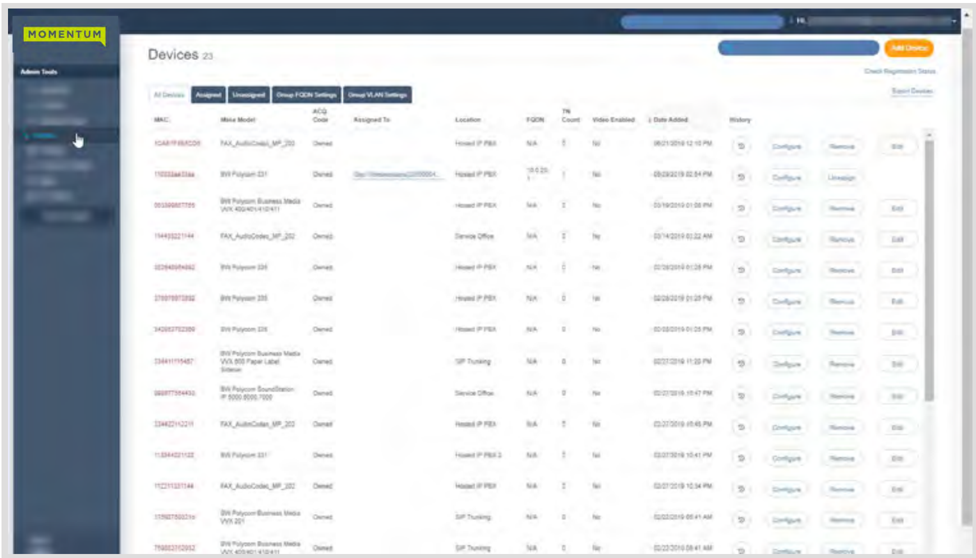
*DEVICES

Restricted. Advanced additional training required prior to Admin access to review and manage devices in NEPS inventory, along with their settings and assignments.

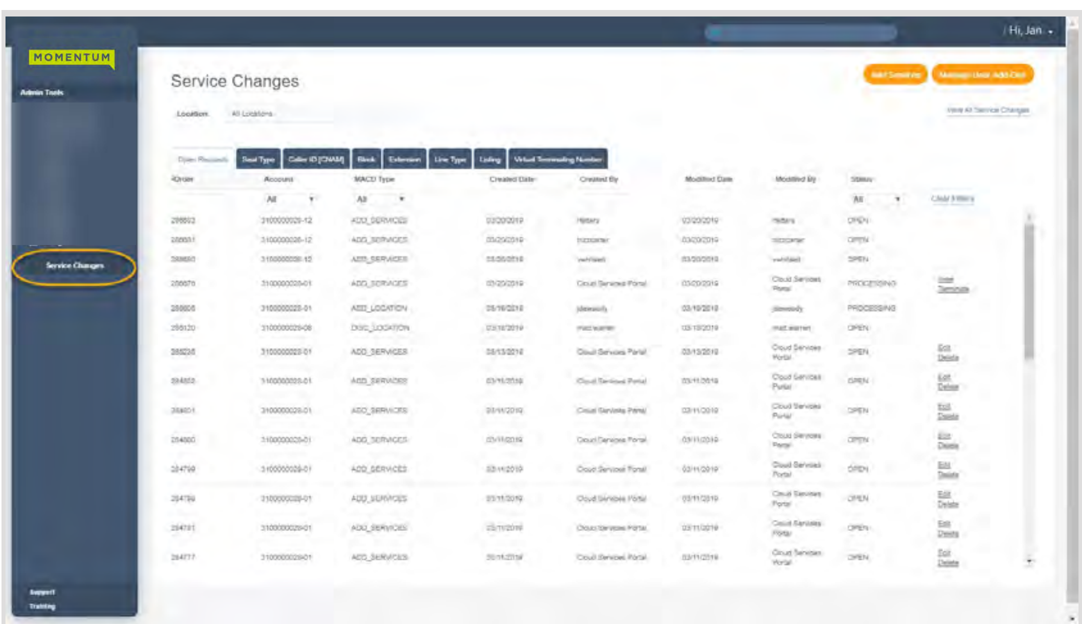
The Devices section offers access to a searchable view of All, Assigned, and Unassigned Devices for management, with the ability to Export a detailed device listing report, and add new devices to inventory, and manage FQDN and VLAN assignments for Locations on the account. The device management tools provided here make it easy to Add new devices to inventory, Configure, Swap and Assign listed devices, Remove device assignments, Delete devices from inventory, and review the historical activity of actions performed on each device within the Portal.



*SERVICE CHANGES

Restricted. Advanced additional training required prior to Admin access.
Manage simple orders and minor changes to services for the account.

The **Service Changes** page displays current account service orders, with easy access to the tools that allow specially trained Admins to Move, Add, Change and Delete account services and review order status information.



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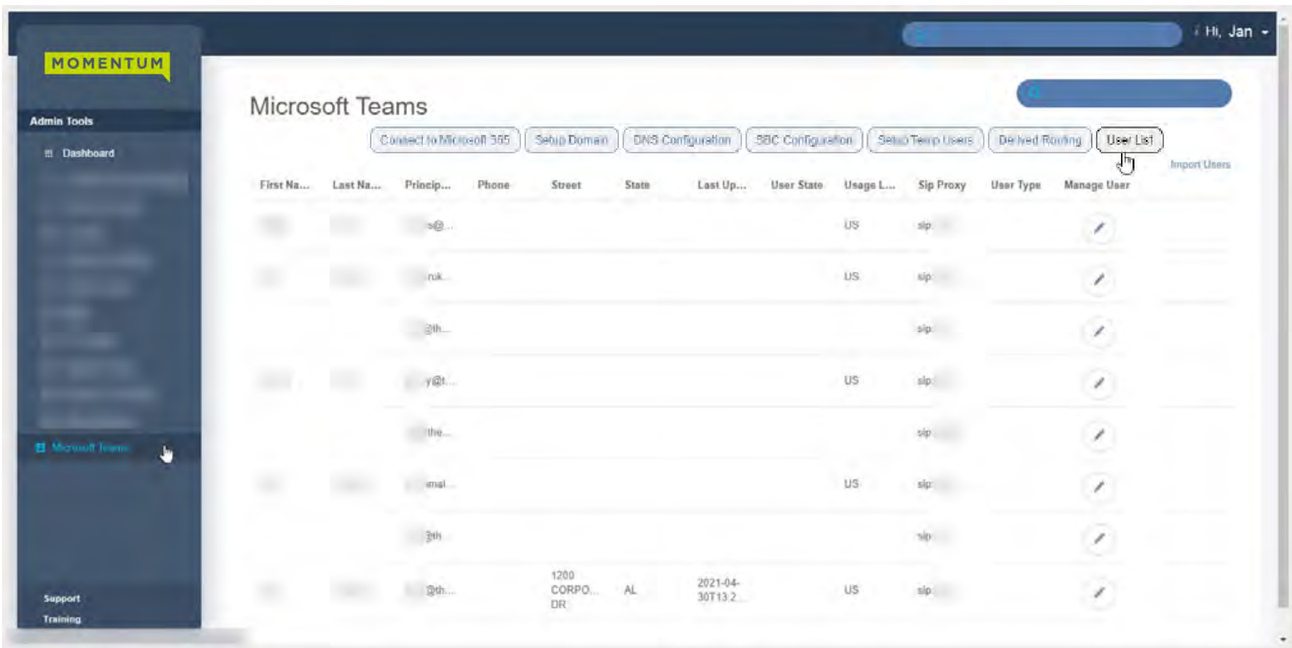
*MICROSOFT TEAMS

Restricted Access for O365/MS Teams Administrators Only.

This section only displays for those organizations with integrated **MS Teams**, and offers specially authorized and trained Teams Administrators access to a simplified deployment wizard. Post-deployment, the wizard tabs offer read-only views. The User List tab offers basic tools for MS Teams TN/Call Routing setting management from this portal. *MS Teams setting and user administration tasks should be managed by an O365/MS Teams Admin with sufficient permissions via the organization's O365 portal.* The available Microsoft Teams section tools include:

MS Teams Connector Deployment Tools • User TN / Call Routing Tools

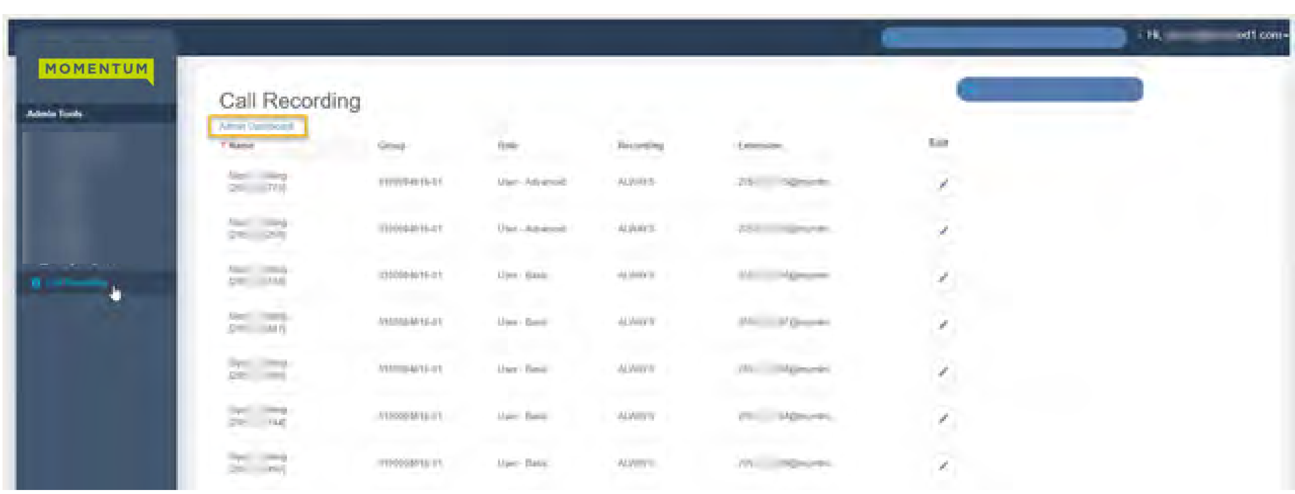


*CALL RECORDING

Access to review and manage Call Recording license holder settings and site access.

This section only displays in Admin Tools for those organizations with Call Recording licenses in place, and offers access to manage voice and 3rd party portal access settings for license holders.

View License Holders • Manage Call Recording Voice Settings • Manage Call Recording Site Access

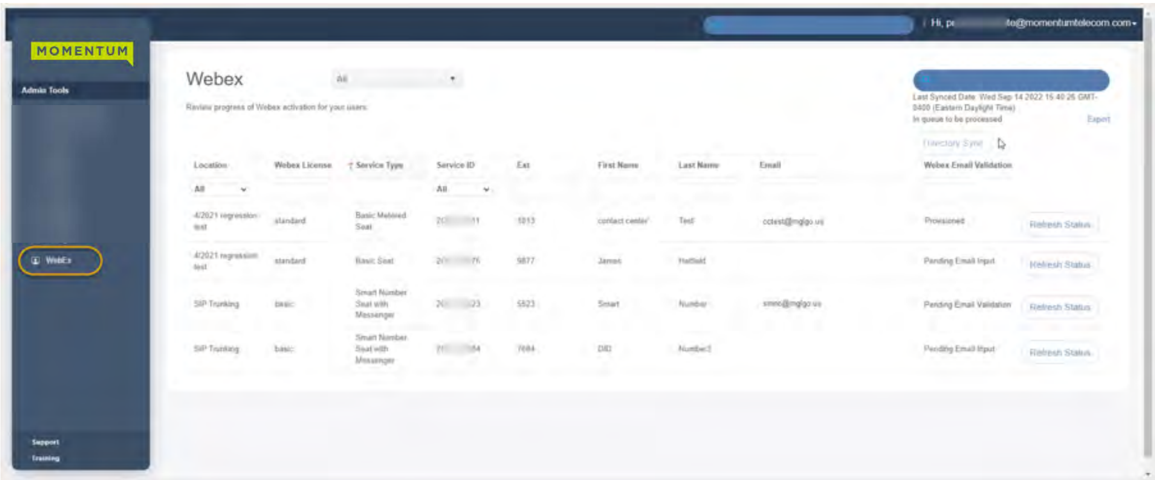


*WEBEX

Limited Access section for accounts with Webex application licenses.

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

Search Table Contents • Filter by Activation Status • Sort Columns • Refresh Status for Updates • Directory Sync



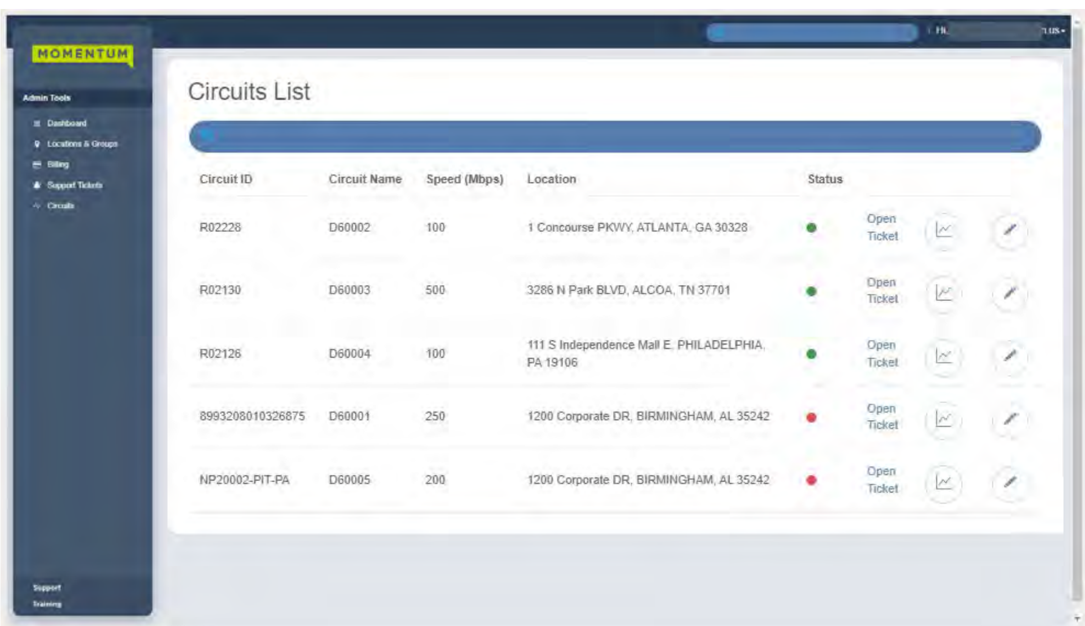
*CIRCUITS | *SERVICE LOCATIONS

DATA CUSTOMERS ONLY

Access to review networking and circuit information.

This section only displays in Admin Tools for those organizations with Data/Networking/Circuits purchased, and offers access to view useful performance information, if monitored.

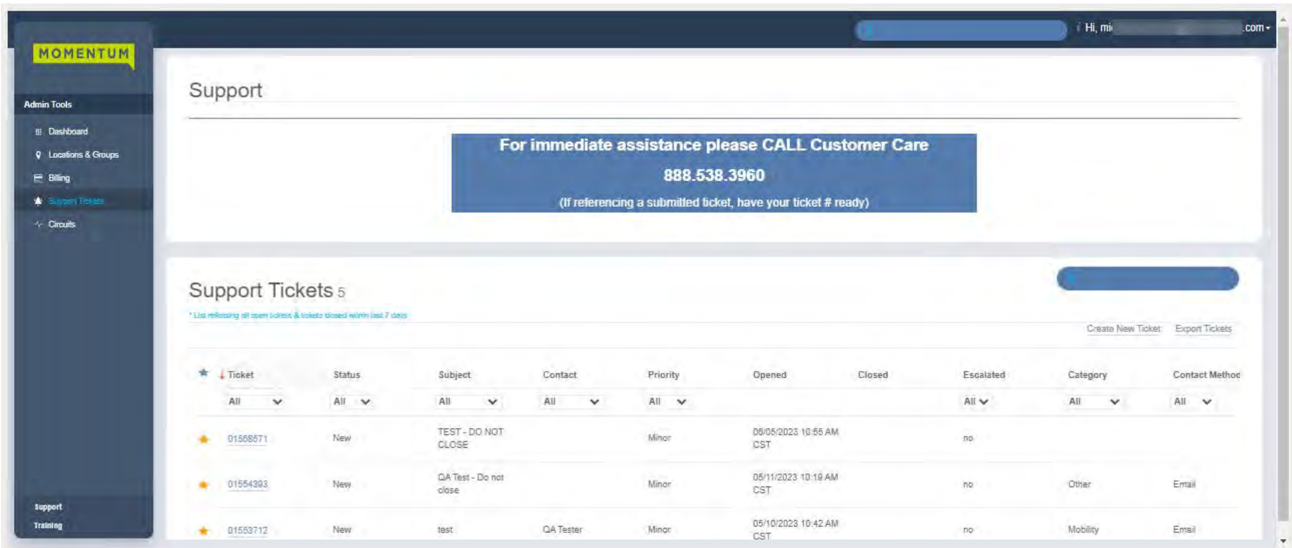
Edit Basic Display Information • View Monitored Devices' Current Status • View Performance Metrics



*SUPPORT TICKETS

Displays contact information for Customer Care. Advanced access permissions required to view or use advanced tools.

The Support Tickets section and related tools require authorization to access and utilize.
Support Ticket submitters need to be Authorized Customer Care Contacts for the organization. Default access level is NONE for all user types except the SuperAdmin who has FULL access by default and manages all other users. The Read-Only access option allows viewing-only access to the current ticket list. FULL access permission to Support Tickets is required to submit tickets and access all related tools.



SUPPORT & TRAINING

The **Support** option in the left navigation Menu panel (and in the quick access drop-down menu at the top of the screen) opens the Support page information located at GoMomentum.com in a new page in the web browser.

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 of useful documentation, information, and videos about Momentum products and services that are available to Momentum customers 24/7.