Cloud Services Portal
Data
Admin Guide

M MOMENTUM

GET STARTED

Momentum Telecom offers an intuitive web Portal that makes it easy for Administrators to customize and manage account features and settings online.

Sign In

To Access the Cloud Services Portal:

1. Open a web browser and enter the URL (web address) provided for online account management. 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).
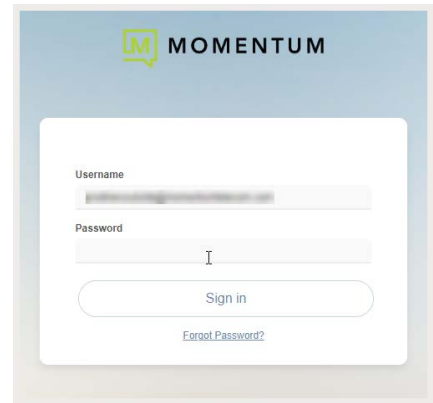
2. Enter the Admin Account Username (xxxxxx@email.com format) and correctly formatted Password credentials in the fields when they are provided/displayed. Note: Password allows up to 30 characters.

   ❖ Use the Forgot Password? link to securely update your password credential. Account holders with a defined email address on file in Manage Users can use this tool and will receive an email with a secure link to change the password. Contact your organization's System Admin for assistance if notified that the process cannot complete or if the system identifies that your account does not yet 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 SuperAdmin for assistance.

3. Click the **Sign In** button.

4. Follow any Multi-Factor Authentication (MFA) method setup steps and/or 6-digit code entry requirements if prompted. *The Cloud Services Portal opens when security protocols are met.*
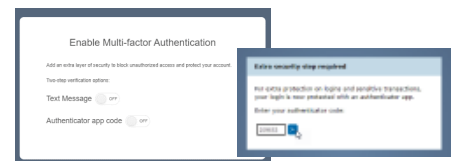
Terms and Conditions

The first time any account holder 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 the Terms and Conditions are updated.*

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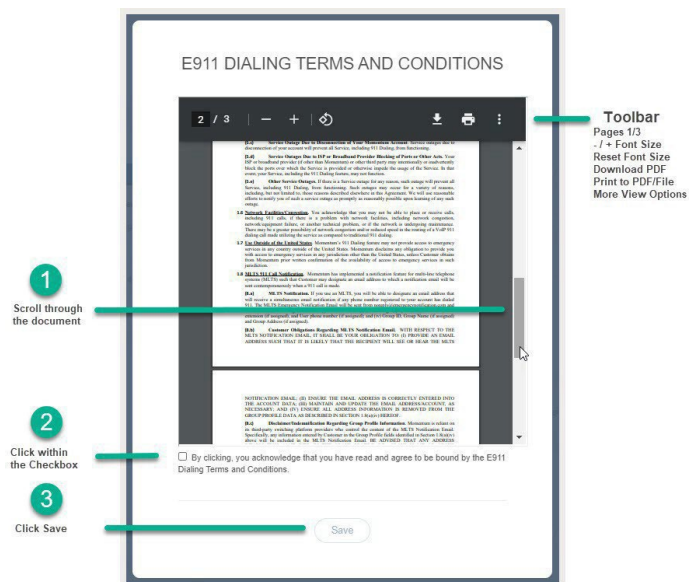
ADMIN TOOLS

The 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, view important system activity or metrics, and much more – quickly and easily online – if they have been granted permission to do so.

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 within the organization's account. This menu displays only those areas the Admin is permitted to view based on their access permissions. Access to work with features and tools within some sections may require additional permissions or will be read-only.

The Admin Tools are user specific. The Navigation Menu Panel on the left can include the following sections for Circuits and Data only customers' Administrators who have sufficient access privileges:
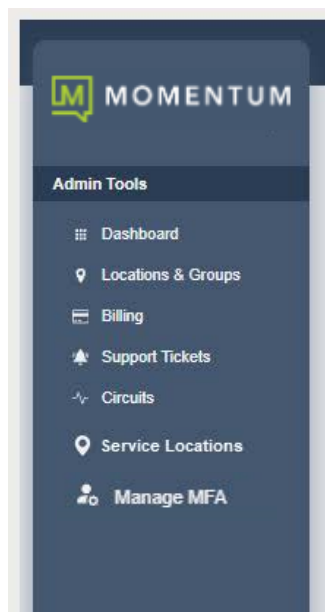
- ❖ Dashboard - The home page for Administrators

- ❖ Locations & Groups - Location or Group level feature/user management tools

- ❖ Billing - **Restricted Access**. Advanced Billing information and payment management for authorized personnel only

- ❖ *Support Tickets - **Restricted Access**. Authorized Admins may be granted access to view (read-only) and/or submit (full access) non-emergency requests for assistance or information to Customer Support

- ❖ *Circuits - Review the list of circuits and network devices in inventory (monitored/unmonitored) and related data

- ❖ *Service Locations - View map locations of circuits in inventory and related data

- ❖ *Manage MFA - Review activation status/Reset MFA management tool

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

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

Each menu option opens the section's 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 for Circuits Admins 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.*
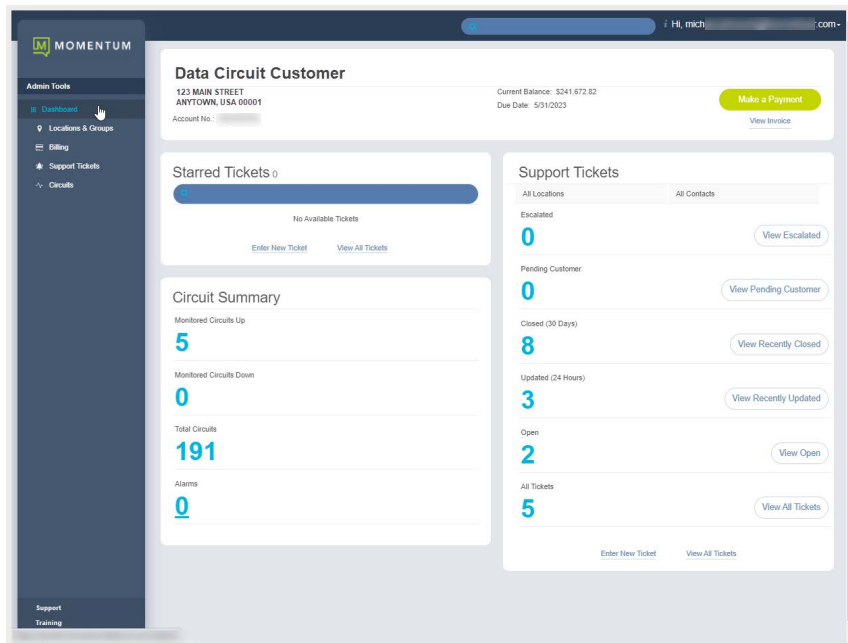

Site Search

The Search field at the top of the application offers site-wide search functionality within the areas the Admin may access. Enter text and any matches found within the sections listed in the Admin Tools Navigation Menu below will display for selection.

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 profile to update the password, open links to review Support and Training resource information, and to Log Out.
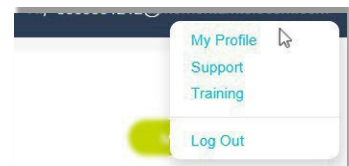

Data Admin Dashboard Sections

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.

Profile

This dashboard section displays basic account information.

For Billing Admins (restricted access), it also shows the current balance, a link to download the latest invoice information, and a direct access Pay My Bill button - a quick link to the Billing page.
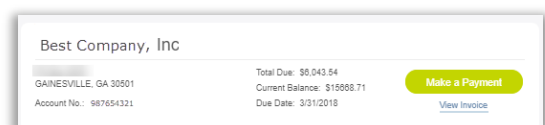
*Circuit Summary

The Circuit summary card displays the current counts for the Circuits and networking devices discovered in inventory for the organization along with basic information and the Alarm count data for the *monitored* devices.
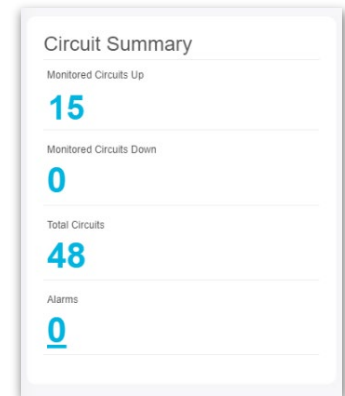
*Support Tickets

*This section requires sufficient access permissions to Support Tickets to view/use all features. This dashboard card displays the most recent support ticket activity and offers filter tools, links to review specific tickets (filtered views), a link to the full list within the Support Tickets page, and a linked option to Create a New Ticket.
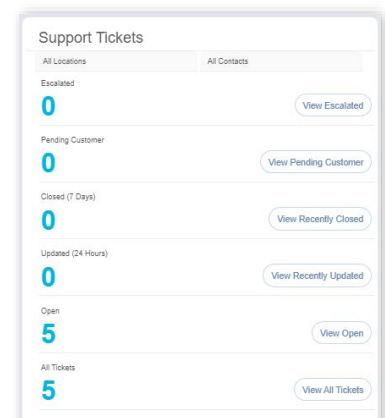
*Starred Tickets

This section requires sufficient access permissions to Support Tickets to view and/or to view all features in it. The card offers searchable quick view of the tickets the account holder has selected to watch (★ Starred). Click on a ticket number link to view the ticket information.

Click on the orange star adjacent to an item to remove the item from 'watched' status and from this list upon refresh.

Where authorized, Admins may also have access to the Create New Ticket tool to report a non-urgent (minor) issue, and/or click the View All Tickets link for direct access to open the *Support Tickets* page to review the list of currently Open and recently closed trouble/information support ticket submissions (within the last seven [7] days) .

*Important Note:

Some Admin Dashboard sections discussed in this document may not need to be displayed in your system - OR there may be additional dashboard sections that display voice tools where those features/services are also in use on the account which are not discussed here and can be reviewed in the *My Cloud Services Voice Admin Guide*.

To secure data appropriately, by default only the organization's designated SuperAdmin has access to view all available Admin Dashboard sections and tools, based on the purchased services and products on the account.

The Dashboard sections display to all others based on purchased services or products and the individual account holder's authorization level as assigned by the organization's designated SuperAdmin. Only Full Access permissions to advanced tools will allow a related section to display with all features in the Admin Dashboard.

My Profile

This section of the portal 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 under the Hi, [account name] in the Toolbar also offers an access point to view the Profile.

The following features and access links are all provided via the Profile card:

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 dispatchable address/location changes.

Links to tools views for managing more profile settings, including Change Recovery Email, Change Password, Enable/Manage Multi-factor Authentication (MFA), and the Edit Profile button, are also displayed here.

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.

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.
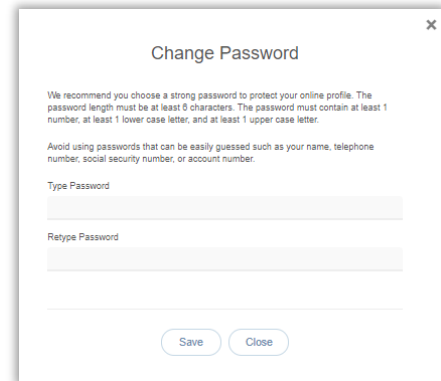
Enable/Manage Multi-factor Authentication (MFA)

The Enable/Manage Multi-factor Authentication link in the View Profile dialog allows users to define the preferred security authentication method (SMS Text or supported code generator Authentication App - Google, Okta, Microsoft). Use the following steps for 1st-time setup or management of account MFA settings while working in the portal if this security protection method has been enabled (as optional or mandatory) for your organization. Instructions for managing MFA settings are provided in the dialog as you make your selection.

1. Click on the Enable/Manage Multi-factor Authentication link in the *View Profile* dialog.

2. Choose one of the MFA Verification options:
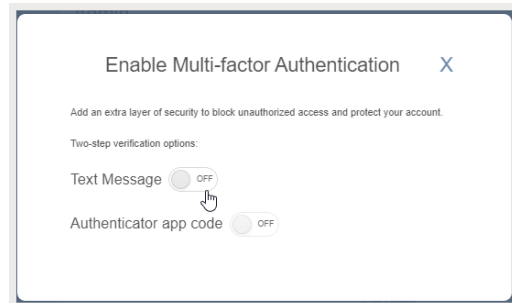
   Text Message
   - Click to toggle this option ON
   - Enter your SMS-enabled 10-digit phone number in the field provided and click the Submit button.

   OR

   Authenticator App Code
   - Click to toggle this option to ON
   - Scan the single-use QR code that is created to connect your Okta Verify, Google Authenticator, or Microsoft Authenticator app and follow the App's instructions for setup.

3. Enter the six (6) digit code you receive via the method you just setup in the Please submit your code field below.

4. Click on the Save button.
Entry of the 6-digit code received via your selected MFA method will be required on all subsequent portal sign in attempts.
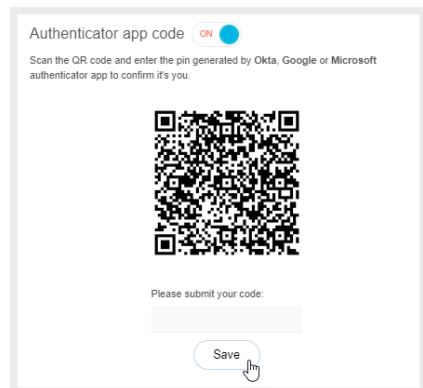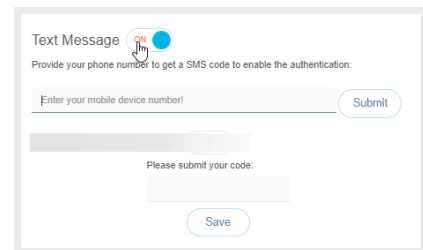
Repeat the steps above to modify/change the MFA verification method selection from this dialog

NOTE: *When changes are made to these settings, the system deactivates the old MFA method. Users/Admins must complete the steps above in full again for the preferred MFA option to set up a new method.*

Contact your organization's Administrator if you need help to Reset MFA in order to access the Portal.

Locations & Groups

The Locations & Groups page provides a searchable list of the Locations or Groups for Circuits currently configured on the account to which the Circuit Admin has access. Authorized Admins may search for terms within the list using the Section Search tool above the list, use the column headers to sort the data alphanumerically and click on the adjacent Edit icon to Manage Users associated with the selected item.
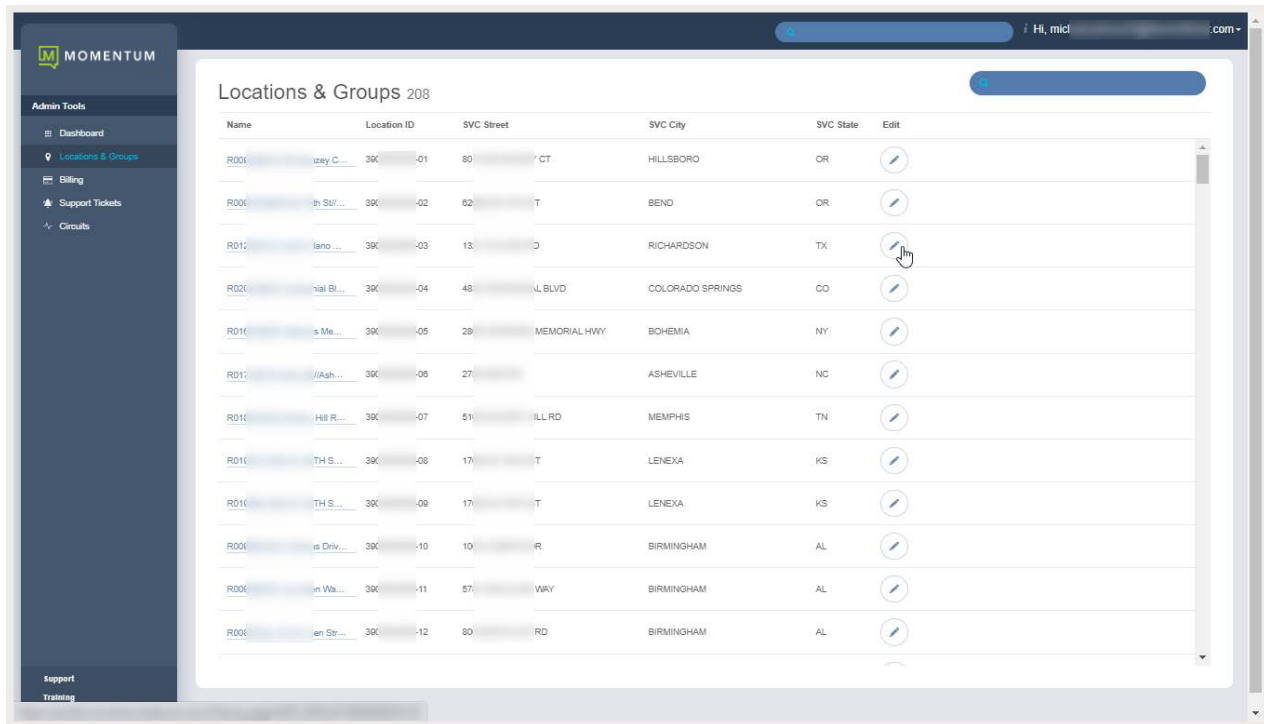
Section Search
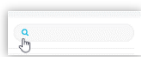
Enter terms to locate data specific to the Locations & Groups section listings.

Column Links

The link under the Name column opens the Group Settings view to allow the Admin to access the Manage Users settings area.

The Edit icon on the far right adjacent to a listing also opens the Group Settings view.

Edit

The Edit icon adjacent to each Listed item opens the Group Settings page for that item.

The link under the Name column *also* opens the Group Settings view.

View Locations & Group Settings

While working in the Locations & Groups page:

Click on the Edit ✎ icon next to a listing in the Locations & Groups section to view the Manage Users settings.
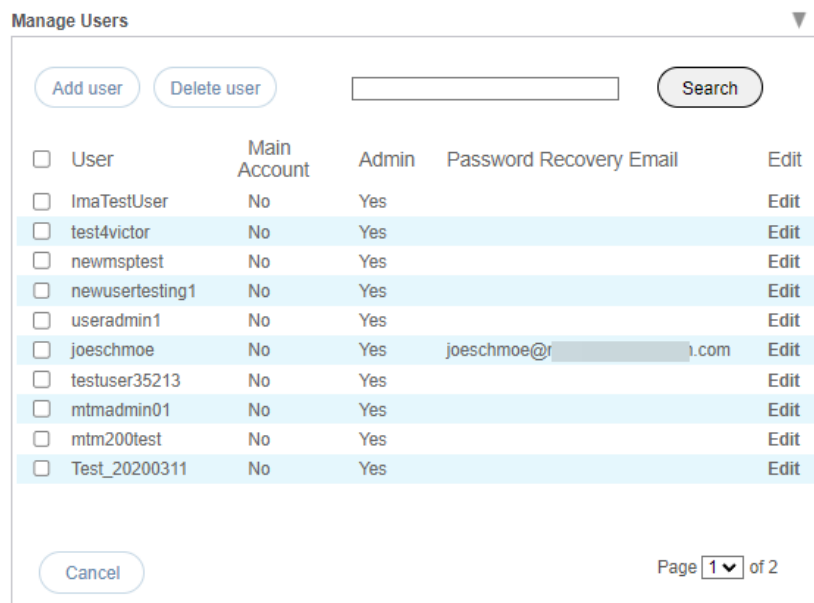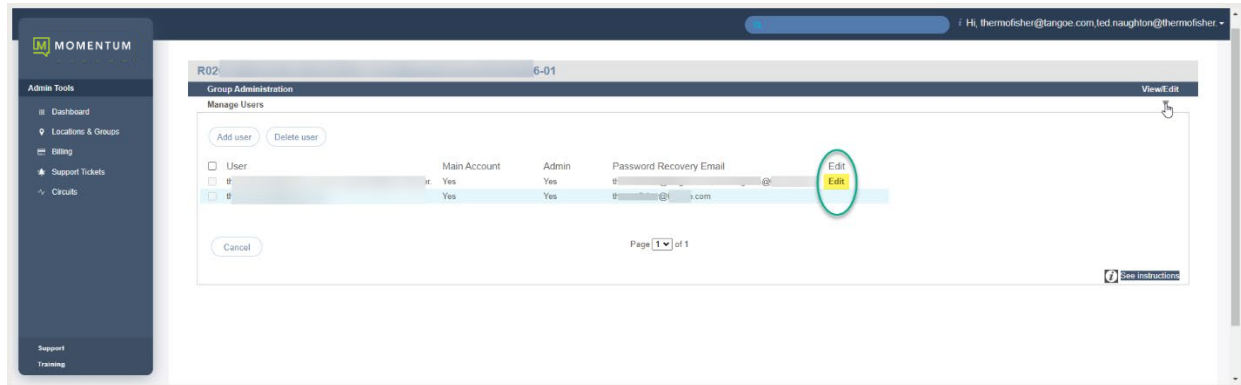
Manage Users

Manage user access rights and assignments. *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 notification regulations.*

Manage User Password and Recovery Email

1. Locate the user account you wish to modify within the list. You may use the Search tool to find a listing using the User ID information.
2. Click the Edit option next to the selected user account.
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 an Admin Account

Note: Do **not** attempt to 'change/edit' a system-generated TN (voice) user's account into an Admin account.

1. Click on the Add User button to create a new Admin account.
2. Enter or define the following:
   - ❖ User Name: Type the name or designation (phone number, device type, etc.) you wish to display in lists. This must be in the typical email format (username@domain.com)
   - ❖ Password: Enter and reenter the initial password assignment for the user.
     Minimum Requirement = 8 characters that include at least 1 number / special character and 1 capital letter
   - ❖ Password Recovery Email: Enter an email address for this user's password recovery notifications.
   - ❖ Group Admin: Option: Click to enable/disable this as the authorization assignment. Selecting and moving Locations from *Available* to *Assigned* **limits** the Admin to viewing ONLY those in the portal.

     Note: *A Group Admin limited to only a few locations will only be allowed to see the Support Tickets they submit, those entered for their location assignment(s) that are set below, and any support tickets submitted without a location assignment.*

   - ❖ Contact Center Manager: Option: Click to enable/disable this as the authorization 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 changes, add the new Admin, and close the dialog.

Edit Account Access and Extension Assignments

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 Group Administrative Rights to define portal visibility parameters, as needed.
   - ❖ ☑ Assign Contact Center Manager Rights to Enable and define portal visibility parameters, 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.

Manage Advanced Permission Access for Support Tickets

SuperAdmin ONLY - Administrator permissions are set in Locations > Edit > Manage Users. Access to the Support Tickets Admin Tools section is restricted and must be enabled via Advanced Permissions. Recommendation: The Admin should complete training prior to use.

- ❖ The default Support Tickets access permission setting for Administrators is **None**.
- ❖ Read Only access offers admin rights to see submitted tickets but not to submit or edit.
- ❖ Full Access to this area should only be granted to an Authorized Contact for Momentum Telecom Customer Support communications and requests.

Important Note: The fastest way to request assistance or information from Customer Support is a call to 888.538.3960. Urgent issues requiring immediate attention or requests for changes that may affect billing should never be submitted via the Support Tickets tools in Cloud Services Portal.

To ensure appropriate usage, Admins should receive specialized training on the tools and features found in the Support Tickets sections of the Cloud Services Portal before authorization is granted.

Go to Locations & Groups > Edit > Manage Users

SuperAdmin while working in Manage Users:

1. Locate a portal account in the list. Note: Best practice is to only provide such access to accounts created for authorized personnel to be used solely for administration to better secure data for compliance.

2. Click on the Edit option next to the selected account.

3. Click on the Advanced Permissions link   Advanced Permissions   that is visible to the SuperAdmin to review and edit the *Advanced Admin Permission* settings for Support Tickets.

   Please Note: At this time, restricted features and tools are not enabled for portal account holders by default and will require additional authorization by the SuperAdmin for access to be granted.

4. **Ticketing** – Click within the appropriate radio button ⊙ to select the level of Support Tickets section and feature access for this account.

   Default Setting = NONE for all except the SuperAdmin. Other options are Read Only and FULL Access. Use Caution as additional access to these tools can be a security risk.

   Best Practice for Support Tickets section/feature access:

   - **NONE** is the default because the vast majority of portal Admin account holders should not have access to review or submit support tickets as a security precaution for all Organizations.

   - **Read-Only** authorization allows portal Admin accounts with this permission level to view tickets submitted by those authorized to contact the Provider's Customer Service department on behalf of the Organization within the Support Tickets section but not to edit or submit.

   - Full - Use Caution. Very few portal Admin account holders should ever be granted FULL access. Do not provide **Full** Access to any portal account holder that does not have the full authorization of your Organization to review all eligible/available support tickets for the organization from the portal, or those who are not authorized to communicate with or make service change or billing requests of the Service Provider on behalf of the Organization.

5. Click the Save button to submit the change for the selected Admin, close the dialog, and return to the *Edit User* view where you will click save again to update the profile for this Admin.

   *Note: It takes a few minutes to update and propagate the new settings for the Admin account holder.* Upon their next portal login, the Admin account holder that was just edited will see the appropriate Support Tickets areas and tools based on the level of access granted by the SuperAdmin.
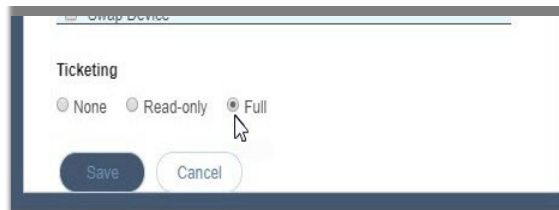
*Billing

Restricted Access. Only Authorized Billing Administrators have access to the **Billing** page and information.

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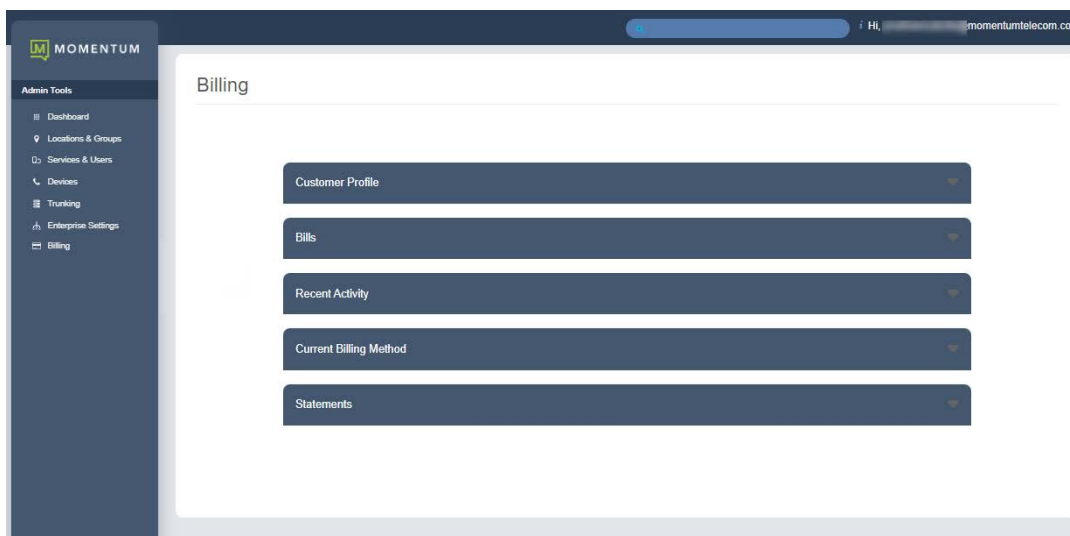
Note: A drop-down selection tool may display in the Billing page that allows specially authorized Billing Admins who manage accounts payable (AP) for one or more locations to choose the billing data they wish to review and administer by selecting the appropriate location.

View Customer Profile

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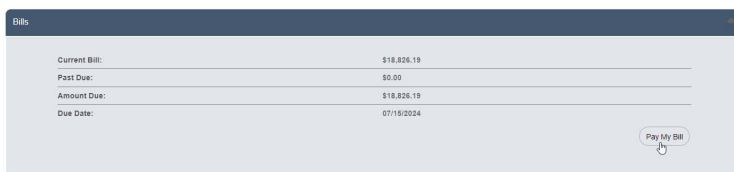

View Recent Activity

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.

**Current Billing Method**

Due Upon Receipt
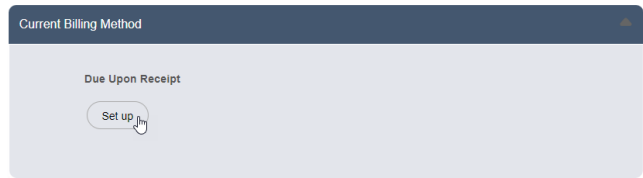
Set up

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 setup or make payments.

The Pay My Bill button and Set Up button both open a dialog where you may select from the following payment method options:

Manage Payments

Manage your billing payment methods using any one of the following options:

Manage recurring credit card payments

Make a 1-time credit/debit card payment

Manage recurring bank draft payments

- Make Recurring Credit card payments
- Make a 1-time credit/debit card payment
- manage reurring bank draft payments

1. Click on prefferend method and Fill in the payment and/or create a recurring payment schedule.
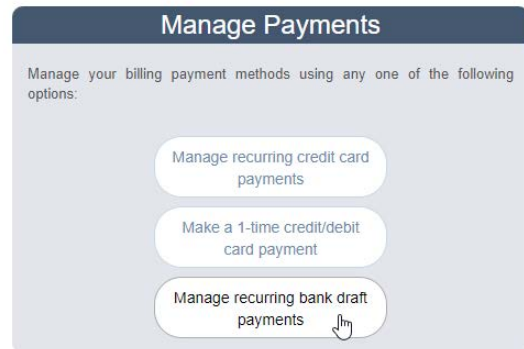
Note: Eligible debit cards will be transacted through the Electronic Funds Transfer network. Momentum can process debit cards on the STAR and PULSE networks or debit cards as credit cards provided there is a Visa, MasterCard, or American Express logo on the front of the card.

2. Click Save or Process to 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 current bill.

   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.

Payments
One-Time Payment

If you choose to pay by credit card, there will be a credit card processing fee in the amount of 1.8% applied to this transaction.
The credit card processing fee is less than our costs incurred with accepting your credit card.
You can avoid the processing fee by choosing another non credit card payment method.

AccountNumber
3100001951-00

AmountDue
18826.19

Amount
0

CC Number

Expiration   Security Code
Month / Year

Process

© 2024

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 setup, an option to cancel this method and choose another payment process option becomes available.

*Support Tickets

Support Tickets in the Cloud Services Portal requires specialized authorization to view or use.
Admins should already be authorized Customer Support contacts for the organization prior to Read-Only or Full access to Support Tickets being authorized. Full Access is required to view/use all Support Ticket tools.
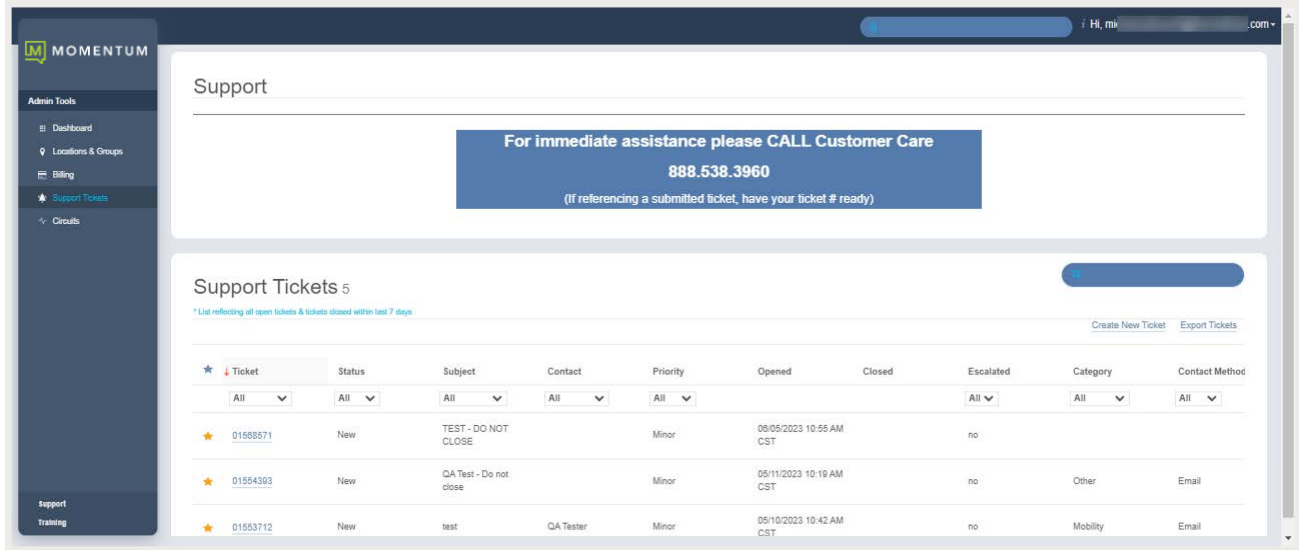

Note: Specialized permission and training is required before access to Support Tickets is granted.
The permission options for Administrators include No Access, Read-Only Access, or Full Access.

The Support Tickets section provides Read only authorized Administrators with access to view the list of **open** tickets submitted via the Portal, along with the tickets that have been **closed** *within the past 7 days*.
Full Access grants permission to review, submit, and update currently open tickets in this section, as well.

Each submitted ticket is listed in a simple table view that is sortable (alphanumeric sorting), filterable (drop-down selections), and searchable (Search field). The displayed ticket information includes Starred (watched), Ticket Number, Status, Subject, Contact, Priority, Opened, Closed, Escalated, Category and Communication (preferred method). The Ticketing page also provides tools to create new tickets, set tickets as Starred (watched/favorites), Edit (comment, update, or request closure for) any open tickets within the list, and to Export the list of tickets within the view to a .csv spreadsheet file.

*Tickets entered via the Portal should be requests for information or assistance with **non-emergency** issues.*
*Requesting assistance with multi-step change processes, billable changes, or urgent issues should **always** be called into Customer Service (888.538.3960) or the Account Manager to ensure that the specialized expert assistance needed for those requests is always provided in a timely manner for speedy resolution.*
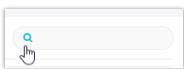
|	
Search tool	A section Search tool for finding any information within the Ticket list.
Create New Ticket	If displayed, this link opens the New Ticket view to allow the Admin to create and submit a new request for assistance to Customer Service for Voice services.
Export Tickets	Creates a downloadable copy of the basic Support Ticket table list contents in a .CSV spreadsheet format file. That file may be saved in a local folder.
☆ ⭐	Click the Star icon in the first column to set the adjacent Ticket as **Starred** (watched) in the Support Tickets page <u>and</u> to add the ticket to the Starred Tickets card on the Dashboard for easy access and review. Click the Orange Star icon again to remove the star and stop 'watching' that ticket in the Portal.
✏	Where provided, the Edit icon opens the selected Ticket for detailed review and/or new comments, attachments, or to request closure.

Ticket Submission Types

Cloud Services Portal provides Administrators who are Authorized Contacts for Momentum Support with the tools to submit minor tickets to customer service for **non-emergency** issues (Data) and requests for information while working in the Portal. Do <u>not</u> use this method to report outage, critical, or major issues. Tickets requesting multi-step change processes, billing changes, or urgent issue reports **require** a call into to Customer Service line **888.538.3960** to ensure that the specialized expert assistance needed for those requests is always provided in a timely manner for speedy resolution.

Search for Tickets
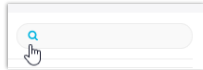
Section Search – The Search field within the *Support Tickets* page (top right) offers a full-featured text search of all information found within the Support Tickets section.
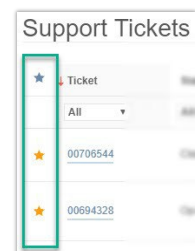
Filter the Ticket List

- The Column Headers offer sorting and filtering tools to make it easy to find specific ticket types or information.
- Click on the Column Header *Name* to sort the list ↑ alphanumerically ↓ by the column contents.
- Beneath some of the column headers are drop-down selection tools to <u>filter</u> by the specific types of information displayed within the table.
- Click on the Clear Filters link in the table header section (far right) to remove any applied filters and return to the default list view.

Watch Tickets

The first column in the Support Tickets page view offers Admins the ability to set a ticket as **Starred** (watched) which in turn lists the watched tickets first when returning to the Ticketing page <u>and</u> displays the selected ticket(s) information in the Starred Tickets dashboard section for easy access to review updates as the Admin logs into the Cloud Services Portal.

Simply click on the ☆ star icon adjacent to a selected ticket listing in the Support Tickets page to turn it orange ⭐. The list will display watched tickets first and add the selected ticket to the Dashboard Starred Tickets *watch* list as well.

Download the Ticket List

1. Click on the Export Tickets link (top right) to download a .CSV format (comma-delimited) spreadsheet containing the basic ticket information that is currently available within the table view.
2. Click on the file download when it is completed to open the file in your spreadsheet application.
3. Save the file to a location within your local system as desired for use/review.
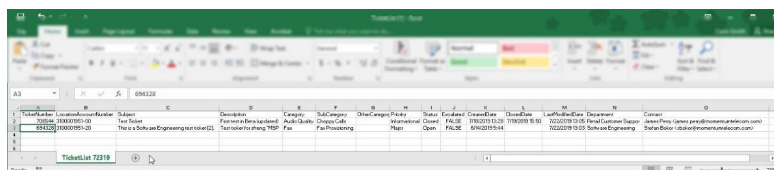
Create a New Ticket

Authorized Admins may be granted access to create and submit support tickets. This tool is available from the Dashboard in the Support Tickets and Starred Tickets cards and in the Support Tickets page. As an Admin makes selections to create the ticket, the dialog dynamically offers additional fields and options to assist.

Call Customer Care at 888.538.3960 for important issues that cannot wait for attention.

1. Click on the Create New Ticket link in the Dashboard or at the top of the Support Tickets page.

2. Select or enter the following information for the ticket:
    * = a Required Field

    ▪ **Type:** A selection field displays only if Voice services are also implemented - and if so, Voice becomes the default 'type' and the field is Required. If options are available, choose from Data, Voice, or Both to continue and create a new ticket. If the account is Data only, the field is preset and cannot be edited.

    ▪ **Circuit Id*** : Required. Select the appropriate Circuit from the drop-down selection list.

    ▪ **Contact**: Optional. Select your name (or appropriate Authorized Customer Support contact) for receipt of responses and updates regarding this issue.
    Note: *Write In should not be used if you are NOT already authorized with the Service Provider to contact Support on behalf of your organization and if used it does not save the name and will NOT make the write in contact an authorized contact.*

    ▪ **Contact Method**: Optional. Select the best method of Support response from the drop-down menu options (Email, Phone). If no option is selected, Your organization's Authorized Contacts' corresponding information for the selected method (as it is currently on file with Customer Support) will be used (usually Email). *Please note, once a ticket is entered via the portal, the contact method will be used and updates to the ticket will also be displayed to the Admin in the Support Tickets section in the Portal and it remains in the list (read-only view) for up to seven (7) days after it is closed.*

    ▪ **Subject***: Required. Type a concise descriptive subject line for the ticket – this information will be the first indication of the issue or request that Support will see and will be displayed for review within the Ticket lists. *Example: Circuit XXXX showing packet loss for past 2 hours.*

    ▪ **Description***: Required. Enter a complete description of the issue or request. Include all relevant information about the issue or request (reproduction instructions, steps taken to fix, times noted, and any other information that will help Customer Support quickly resolve the issue for you or respond with the information you require as quickly as possible. Ticket Description contents may be edited in the portal for up to 24 hours however, use **Add Comments** to update ticket information rather than editing the Description field. Using Comments ensures that all ticket contacts are notified of changes and updates quickly.

3. Click on the Submit button when all information has been included to send the ticket to Support and make a note of the new ticket # that displays upon successful submission. The ticket will be submitted as a minor issue/request by default.

    You may also click the **Cancel** button to quit and return to the last view.

    OR - Complete the following steps prior to clicking Submit *as needed* to include additional information (a specific device or circuit) or attachments (screenshot images, a .txt log file) with the ticket submission to help Customer Care to provide the assistance you've requested more rapidly.

Add Affected Circuits to a Ticket

1. Click on the Add Circuits button to open the list.

2. Click within the adjacent ☑ check box to select one or more affected circuits. Click again to remove selections.

3. Click the Add as Comment button when finished to include that information with the ticket submission.
   Or click Close to exit the dialog without making changes.

4. Click on the Submit button if ready to send the ticket to Support.
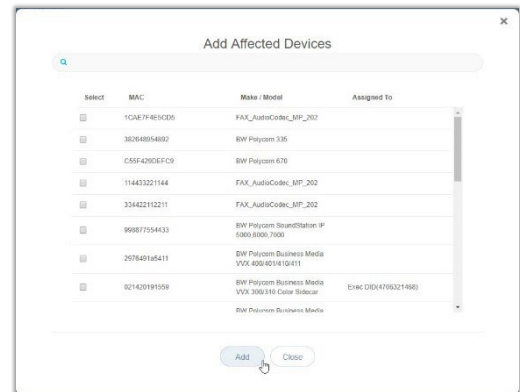
   Make a note of the new ticket # for future reference.
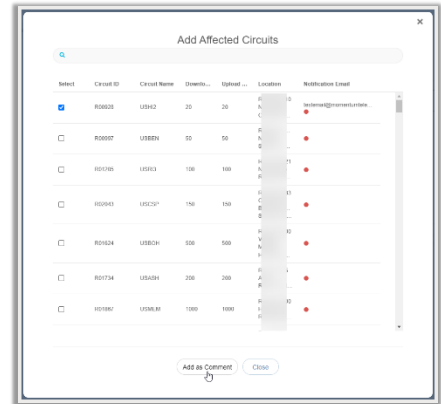
Add Affected Devices to a Ticket

1. Click on the Add Affected Devices button to open the list.

2. Click within the adjacent ☑ check box to select each device that is affected (where available for the location). Click again to remove selections.

3. Click the Add button when finished to include that information with the ticket submission.
   Or Click Close to exit the dialog without making changes.

4. Click on the Submit button if all information for the ticket is included.

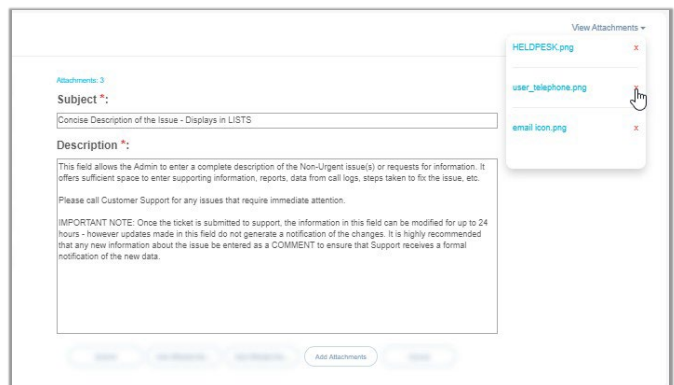   *Make a note of the new ticket # for future reference.*

Add Attachments to a Ticket

Admins may attach individual PDF or Image files to a ticket to include screenshots or reports that may assist Customer Service with issue resolution.

1. Click on the Add Attachments button to open a local file selection form.

2. Browse to, select, and click Open to add an Image (.jpeg, .gif, .tiff, .png) or PDF file from your system that will be submitted along with the ticket.

3. Repeat the steps above to include more file attachments, as needed. *The system will notify users if the selected attachment file size limits are exceeded or the attachment file types are incompatible.*

4. Select the View Attachments link (top right) to review or remove **X** attachment(s) underlined before submission.

5. Click Submit when all ticket information is included to send the ticket with attachment(s) to Support.

   Or click Cancel to clear all selected/entered information and quit the ticket creation process.

   Make a note of the new ticket # for future reference.

View Ticket Updates

Quick access to review any updates to submitted Tickets is available in the Admin Dashboard if authorized to view those features (Full Access)

Information about each available ticket is displayed within the Support Tickets page. Access to open tickets to view more information is provided for a read-only view using the Ticket Number link or click on the adjacent Edit ✏ icon within the Ticket list to view and update or comment on a ticket.
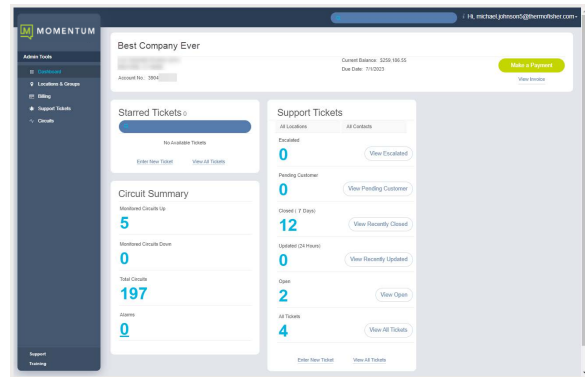
View Ticket Attachments

While working in the Support Tickets page:

1. Click on the Ticket Number in the table,
   Or click on the Edit ✏ icon adjacent to a Ticket to open the *Edit* View.
   The number of attachments is listed above the Description field as a reference.
2. Click on the View Attachments link (top right in the Ticket Edit view).
   A pop-up dialog displays a list of the attached file name(s) that the submitter included.
3. Click on the desired file name within the pop-up dialog to download and then open a copy of the attachment.
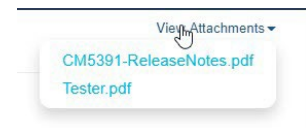
Edit a Ticket

The initial information defined for the ticket cannot be modified, however new information, attachments, or Affected Circuits or Devices selections may be added at any time while the ticket is still *Open*.

While working in the Support Tickets page:

1. Click on the Edit ✏ icon adjacent to the desired Ticket within the list.
2. Add a comment or use other available tools as needed to add information to the Ticket or Request Close.
3. Click the Submit button when finished to send the Ticket update(s) to Support or click on the Cancel button to remove the latest changes and revise your edits or just exit without making changes.

Add a Comment to a Ticket

To notify Support of changes or additions to the original request or issue description, submit a **Comment**. Note: Changes made to the description information (if still allowed) are not identified as 'updates' and will *not* be included by Salesforce in notifications to ticket owners/team members or the ticket submitter.

While working in the Support Tickets page:

1. Click on the Edit ✏ icon (Far right column) adjacent to the ticket you wish to update with a new comment.
   The Ticket's Edit View displays.
2. Click on the Add Comment button to open a *New Comment* field.
3. Type up to 3000 characters and spaces in the *New Comment* field.
4. Click on the Submit button to send your latest comment to Support or click on the Cancel button to remove the latest changes and revise your edits or exit.

Request Ticket Close

Caution: This action is immediate. Once the request to close is submitted to Support, the ticket is set to Read Only within the Portal. Customer Care will finalize any work on the issue and close the ticket. If this request is made in error, a new ticket must be created and submitted OR contact Customer Support directly via phone to request a 'Re-Open' for the ticket.
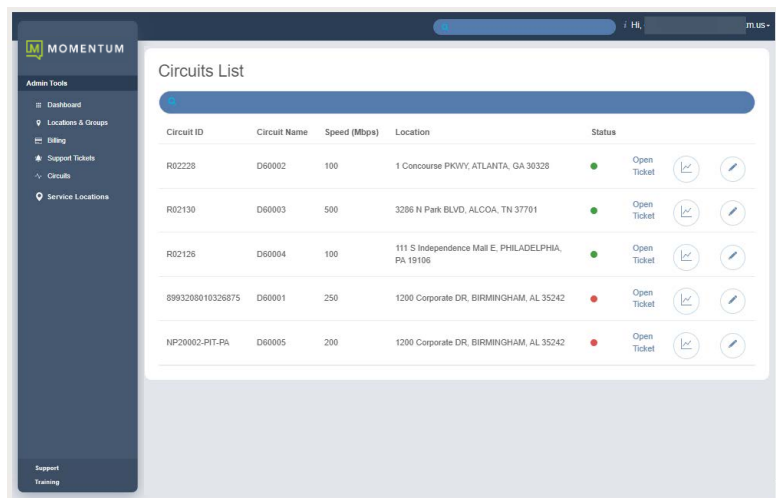
While working in the Ticket Edit view:

1. Add any supporting comments, attachments, or affected user/device updates that are needed by Support.

2. [Request Close]   Click on the Request Close button to send a request to Support to close the ticket.

    Once submitted, the focus returns to the Support Tickets list and the ticket status updates to show a close was requested. The ticket is no longer available for further modifications or comments within the Portal and becomes 'Read-Only'. Support staff will close the ticket.

*Circuits

The Circuits section displays a searchable list of the known circuits on the account with tools that allow an Admin to sort the list ↑ alphanumerically ↓ by clicking on the column headers, Edit some circuit-related information displayed in this portal (only), and view performance data for an item in the table.

Section Search	Status	Edit	Open Ticket	Graphs
	● ｜ ●	✎		∿
Enter terms to locate data specific to the Locations & Groups section listings	Up ｜ Down color coded indicators for **monitored** circuits only.	The Edit icon adjacent to each listed item opens the *Edit Circuit Item* dialog	Where visible, click to create and submit a ticket for the adjacent device	The Graph Icon opens a new view of useful performance metrics for the adjacent item

The table in the Circuits List provides the following information for each listing:

- Circuit ID – The circuit identifier
- Circuit Name – The circuit type name - can be changed to display in lists within this portal
- Speed (Mbps) – General upload/download speed of the circuit displays (where applicable)
- Location – The location information on file for the item
- Status – If monitored, this column displays an up/down status indicator. Green ● = **UP** | Red ● = **Down**
- Open Ticket – If visible, click to create and submit a ticket for the adjacent device - Ref: Support Tickets
- Graphs – Click to view graphical performance metrics
- Edit – Click to modify the display of information (as shown within this portal only) that is made available for editing. Changes here are for display purposes within the Cloud Serivces Portal and do not update the device.

Edit Circuit Information

While viewing the Circuits List, some information can be modified for each listing displayed here to make it easier to identify within this portal. These changes are for portal display purposes only and do not update the circuit.

1. Click on the Edit ✐ icon adjacent to the desired listing to open the Edit Circuit Item dialog.

2. As needed, make changes to the following (where authorized and/or if the system allows edits for the item):

   - Circuit ID: Read-Only. The assigned identifier for the circuit
   - Circuit Name: The circuit type name
   - NID MAC: Read-Only. The mac address for the device
   - Download Speed (Mbps) and Upload Speed (Mbps) -Enter/edit the speed displayed for the device.
   - Location: Read-Only. The item's location address on file.
   - Notification Email: Enter an email address for receipt of automated notifications from the service provider - if it is monitored.
   - Set Latitude | Longitude: Enter coordinates to override the default (address on file) map location displayed for this circuit, as needed.
   - Reset Override Coordinates: Click this link to return the map coordinates in the Set Latitude | Longitude fields to the original address on file.

3. Click Save when finished to update the system with the new information and exit the dialog or click Cancel to quit and exit the dialog without making changes.

View Performance Metrics

While viewing the Circuits List:

Click on the name of the desired item where it is listed in the Circuit ID column to open a view with performance metrics for that item. Interactive graphics show useful metrics data and historical information like Latency history and Packet Loss data. The Graph icon ⬈ adjacent to a listing in the table also opens this view.

Use the filter tools above each chart section in view to review performance metrics for specific time periods or data types.
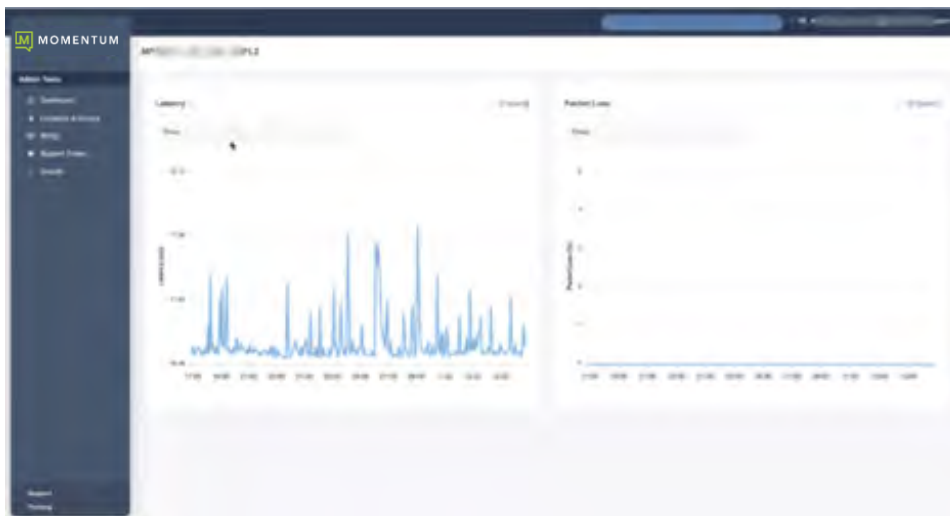

Hover the cursor over the graph to view more precise metrics.

Click the [Expand] tool to increase the size of the selected section for a better view and click the dashboard link in that view to return.

Service Locations

The Service Locations menu link opens a user-friendly map view of the circuits in your inventory that are currently being monitored by the service, as well as those disclosed by your organization but that are not currently monitored by the service.

- The map view can be expanded and moved around using the + | - tools (lower right) or the cursor.
- The map can be displayed in Map Terrain view or Satellite view.
- Basic Statistics display - select specific circuits to refine the data or minimize the statistics dialog view.
- Click on a pin in the map to view more information about a specific circuit noted in the map.
- Ÿ[˘Á¸ æ ÁÒåãÁ&@ Áaddress Ácoordinate Áੀ{ǁ{ æ਼} Áor name ੮੯ɾÁ¸^^å^åD&Á &|਼ã^ Á&@^Á]^&ãã&Áੴå¦^•• Á¸ @¦^Á[¦^&੯@ੲ਼Á¸}^&ã&˘ã•Áੴ^&Á[•^&[*^c@¦Áon the map [¦Á&੯@^Á[&ੲਁਁ} &@ੲ}*^•È
- Ô[¦[¦&&[å^•&ੴ^Á¦[çãã^åÁon the pins ੮Á੮æੴੲ•ã dK

  Ü^åÁੴÁ੮}ੲ&[¦^åÁੵ੯ÅU~|ã਼^

  Ÿ^||[¸ÁੴÁ Multiple: A number indicates how many known circuit devices are identified. Click the pin to see the current status of all devices in this area on the map.

  Õ¦^^}ÁੴÁ੮}ੲ&[¦^åÁੵ੯ÅU}|ã਼^

  Õ¦æê ÁੴÅੵ}{ [}ੲ&[¦^å
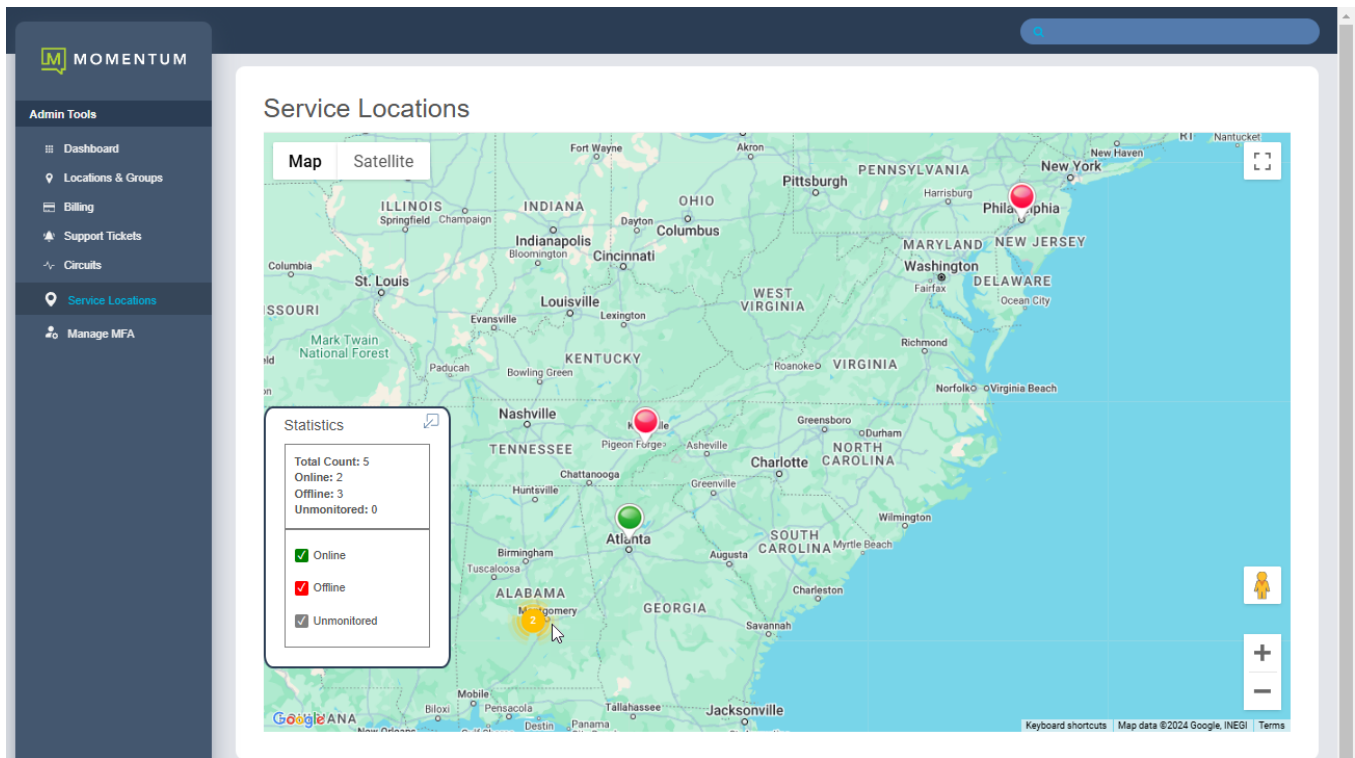
*Manage MFA

This area displays a list of the portal accounts the Admin has been granted permission to view.

Click on the Manage MFA option in the left navigation menu to open the Manage MFA Users section. This area populates as each Portal account holder sets up their MFA protocol for Cloud Services Portal access. The data displays in a ↑ sortable ↓ and searchable list of the User and Admin portal access accounts, making it very easy to view the MFA usage of the organization's portal users and quickly assist users who need help with MFA protocols to gain access to the portal. The SuperAdmin can see all portal access accounts for their organization's users and Admins. Group Level Admins can see the portal access accounts for the users in the groups/locations they are authorized to manage.

This section also offers a simple section search tool at the top of the list. The information provided in this page for each listing includes:

- **User ID** - The Service Provider's user account identification number
- **User Name** - The login user name credential for Users ([TN]@mymtm.us) and admins (email)
- **Email** - The notification email address if defined for the user/admin account in Manage Users
- **Verification Method** - The users' currently activated MFA protocol type (SMS text or one of the apps)
- **Last Reset** - The date the last MFA Reset action was performed for the account

Reset MFA

Reset MFA   This button provides Admins with information about the state of each user's MFA activation status and a simple way to immediately disable/disconnect the current setup and prompt the user to set up a new MFA protocol during the login process (if MFA use is Mandatory).

- Grayed button = MFA is inactive/not currently set up for the account - a reset cannot be performed.
- White button = MFA is active/in use for the account - a reset can be performed.

Simply click on the Reset MFA button adjacent to the desired account if it is active to immediately deactivate the user's current MFA method (SMS Text or App). Once clicked, the button will turn gray and will not become available to click again until the user has set up an active MFA protocol for portal access.
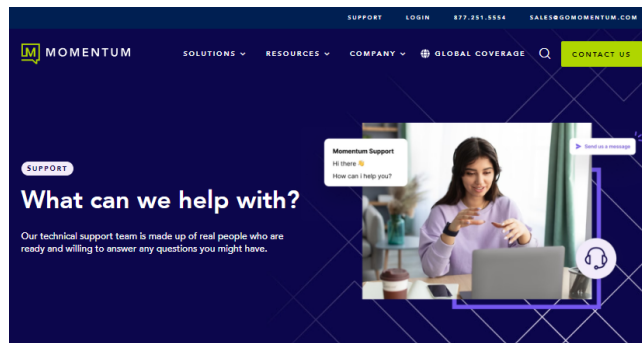
This action will allow the selected portal account holder to:
- Sign in and bypass MFA protocol usage during portal login if MFA use is set to Optional.
- Be prompted by the system to select and set up a new MFA verification code receipt method (SMS Text or authentication app) during login if MFA use is Mandatory.

Note: If the user/Admin is currently logged into the portal, an MFA Reset is not necessary. Users may modify their own MFA method selection/setup by going to My Profile > View Profile > Manage MFA and following the relevant setup/activation steps. **Please Note: Admins cannot set up other users' MFA protocols for them.**

SUPPORT

The Support option in the left navigation *Menu* panel (and in the quick access drop-down menu at the top of the screen) is a quick link to the Support page on the GoMomentum.com website.

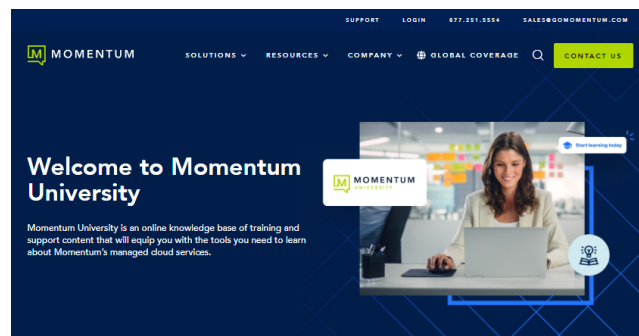## TRAINING

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 browser page.

This web page offers links to useful Momentum University documentation, information, and videos about Momentum products and services that are available to customers 24/7.

The 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

A phone call to Customer Care is the fastest way to get help when you need it.

888.538.3960

Live phone support is available 24/7 for speedy assistance and issue resolution.

Have your Momentum Telecom account number handy to help us better assist you when you need us.

Important: In order to provide *optimal* support, we recommend that the Account Owner or an Authorized Contact contact us via our toll-free support number (above) regarding any critical issues that may require quick troubleshooting for resolution. Support Tickets submitted via the subscriber portal or email are considered minor issues or requests for information by default and will be worked as quickly as possible by the team in order of receipt. A call to customer care always ensures speedy assistance.

ONLINE SUPPORT INFORMATION

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 RESOURCES

GoMomentum.com/MU

Momentum University is an online library of routinely updated training and support resources that will equip you with information about Momentum's best-in-class cloud services and their features. This library includes 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 - 24/7/365.

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