

## SIGN IN

To access the Admin Tools area within the Cloud Services Portal: Go to <https://portal.momentumtelecom.com> to enter your separate **Administrator** account Username and Password credentials to Sign In and follow any MFA protocol setup or data entry steps presented to you. *Note: Upon initial log in, the system requires all account holders to acknowledge Terms and Conditions.*

## ADMIN TOOLS MENU

The **Admin Tools** Menu on the left side of the page offers permission-based access to at least some of the following sections. **Note:** Only those sections and tools the organization needs and the Admin is authorized to view will display.

- » **Dashboard** - The site Home page displays account activity, and offers filtered quick access links to Admin Tools sections.
- » **Locations & Groups** - Access to manage Department or Service level settings organized by Locations or Groups.
- » **Services & Users** - Access to review and manage individual User level services and settings.
- » **Trunking | IP Trunking | Enterprise Trunking** - General SIP or customized trunk information and setting administration.
- » **Enterprise Settings** - Enterprise level feature and services management.
- » **Contact Center** - Manage queues, schedules, assignments and the setup for any Contact Center(s) on the account.
- » **\*Billing** - Restricted Access. Authorized Admin access to account billing history and payment management tools.
- » **\*Microsoft Teams** - Restricted/Limited Access. O365 / MS Teams Admin access to manage hosted voice access for users.
- » **\*Call Recording** - Limited Access - Licensed only. Manage voice settings and Call Recording portal access permissions.
- » **\*Webex** - Webex Customers Only. Search/Review activation process status data for Webex licenses on the account.
- » **\*Support Tickets** - Restricted Access. View and (where fully authorized) submit minor tickets to Momentum's Retail Support.
- » **\*Circuits | Service Locations** - Data Only - List of active circuits/NIDs in inventory. Permission-based access to additional tools.
- » **\*Manage MFA** - Review user MFA activation status and Reset MFA to assist users with MFA-related portal access issues.
- » **\*Devices** - Provider-Level Only. Manage devices currently in NEPS inventory and their user assignments.
- » **\*Service Changes** - Provider-Level Only. Advanced billing impacting single-process service and order management tools.

## ADMIN DASHBOARD

*The Home page for Administrators.*

The Admin Dashboard provides at-a-glance views of *Live* and historical account activity AND direct quick-access links from each card section to filtered views of your administrator-level tools, services, and features. Now you can track what's going on within your Enterprise account and access any area or service your organization wants you to manage from one web page - **fast**.

The screenshot displays the Momentum Admin Dashboard for 'Best Company, LLC'. The interface includes a sidebar with 'Admin Tools' and 'Dashboard' options. The main content area is divided into several sections:

- Account Info:** Best Company, LLC, 888.538.3960, Account No. 3103312011.
- Favorite Services:** A table listing services like 'SIP Trunking' and 'Voice Mail' with columns for Name, Service, ServiceNumber, and Activation.
- Activity History:** A list of recent activities with columns for ID, Name, and Date.
- Starred Tickets:** A table of tickets with columns for ID, Subject, Priority, Status, and Label.
- Quick View:** Summary cards for Locations (6), Services & Users (156), and Devices (26).
- Call Activity:** A line graph showing call volume over time with a legend for different call types.
- Support Tickets:** A summary card showing 1 support ticket with buttons for 'View Enabled', 'View Pending Customer', 'View Recently Closed', 'View Recently Updated', 'View Open', and 'View All Tickets'.

## 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. 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](#)

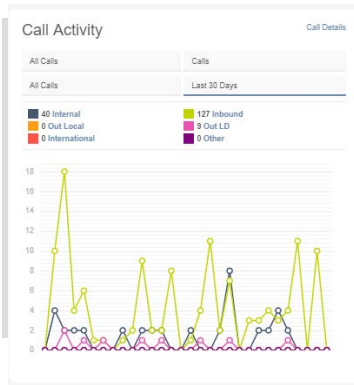
**Best Company, Inc**

GAINESVILLE, GA 30501  
Account No.: 987654321

Total Due: \$8,043.54  
Current Balance: \$16868.71  
Due Date: 3/31/2018

[Make a Payment](#)  
[View Invoice](#)

**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.



**Devices** - Current counts for registered, unassigned, and provisioned devices in Momentum inventory, and the ability to filter by [Location](#), check registration status, and access device assignments.

[Links to: Services & Users](#)

**Devices** Check Registration Status

All Locations

Registered: **0**

Unregistered: **7** [Manage](#)

Provisioned: **7** [Manage](#)

**Activity History**

- Basic Metered (4706321482) a few seconds ago
- DialIn Feature (4706321488) a few seconds ago
- AA Tree (4706321472) a minute ago
- Exec DID (4706321468) 17 hours ago
- Basic Metered Vmail (4706321535) 2 days ago
- Smart Number (4703770105) 2 days ago
- Exec Loc 2 (2056661018) 2 days ago
- Voicemail Only TN (6782939529) 5 days ago
- E911 DID (6783674584) 6 days ago
- Premium Queue (4703770093) 7 days ago
- DID DID (4705093297) 8 days ago

**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**

Name	Service	Service Number	Ext
★ Basic Metered	Basic (Seat) Metered LD	4706321482	1482
★ Basic Metered Vmail	Basic Metered Seat with Voicemail w/ DID	4706321535	1535
★ Smart Number	Smart Number Unlimited Seat	4703770105	0105
★ Voicemail Only TN	Voicemail Only with TN	6782939529	9529
★ Exec DID	Executive Seat w/ DID	4706321468	1468
★ AA Tree	Auto Attendant Tree	4706321472	1472
★ Exec Loc 2	Executive Seat w/ DID	2056661018	1018

[View All Services](#)

**Favorite Services** - Locate accounts to set as favorites ★ for constant quick Dashboard access.

[Links to:](#) The [Services & Users](#) page and to the selected User's Dashboard for account management.

**Quick View**

Locations & Groups: **10** [Manage](#)

Services & Users: **308** [Manage](#)

Devices: **24**

**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](#)

**Starred Tickets**

ID	Subject	Type	Status	Last U.
12345678	Test	Issue	New	10/10/2018 10:10 AM CDT
87654321	Test	Issue	New	10/10/2018 10:10 AM CDT
11111111	Test	Issue	New	10/10/2018 10:10 AM CDT
22222222	Test	Issue	New	10/10/2018 10:10 AM CDT
33333333	Test	Issue	New	10/10/2018 10:10 AM CDT

1 - 5 of 5 items

**Support Tickets**

- Open: **0** [View Open](#)
- Pending Closure: **0** [View Pending Closure](#)
- Closed (All Time): **0** [View Recently Closed](#)
- Open (All Time): **0** [View Recently Opened](#)
- Open: **5** [View Open](#)
- In Progress: **5** [View In Progress](#)

**Support Tickets & Starred Tickets** - These two optional dashboard cards only display to authorized Admins and offer quick views of useful support ticket information, and link access to the Support Tickets section.

## 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.

Name	Location ID	Services	Users	SVC Street	SVC City	SVC State	Emergency Call Notification Email	E911	Edit
Hosted IP PBX	<a href="#">3100001951-01</a>	<a href="#">81</a>	<a href="#">73</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	
SIP Trunking	<a href="#">3100001951-02</a>	<a href="#">22</a>	<a href="#">21</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	
Hosted IP PBX 2	<a href="#">3100001951-03</a>	<a href="#">8</a>	<a href="#">8</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	
Service Office	<a href="#">3100001951-04</a>	<a href="#">3</a>	<a href="#">2</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	
Brandon Ext SIP Trunk Test	<a href="#">3100001951-05</a>	<a href="#">0</a>	<a href="#">0</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	
IP Trunking test location	<a href="#">3100001951-06</a>	<a href="#">48</a>	<a href="#">28</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	
IP Trunking Test2	<a href="#">3100001951-07</a>	<a href="#">54</a>	<a href="#">35</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	
location gama	<a href="#">3100001951-08</a>	<a href="#">4</a>	<a href="#">2</a>	880 Montclair RD	BIRMINGHAM	AL	william.powell@momentumtelecom.com	See 911 Address List	

## 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.

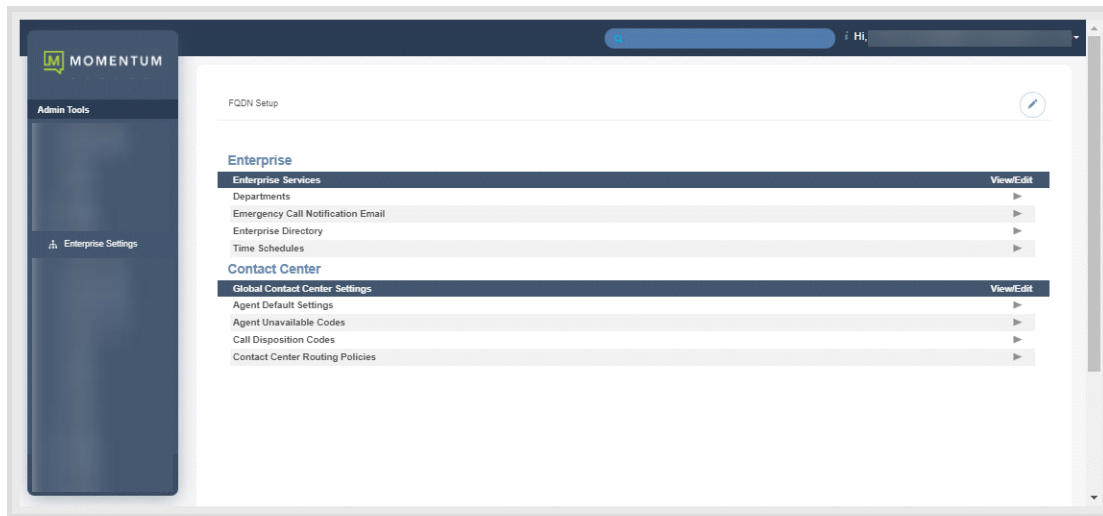
Service Type	First Name	Last Name	Service ID	Extension	MAC	Location	Dept	Assigned To
★ Anywhere Feature Control	anywhere	control	7827286257	9257		Call Center		anywhere control
★ DID	DID		7827286287	9287		SIP Trunking		DID DID
★ Basic Metered Seat with Voicemail or DID	Basic	M Vmail	7827286253	9253	a540541356dc	Call Center		Basic M Vmail
★ Auto Attendant Tree	AA	Tree	7827286283	9283		Call Center		AA Tree
★ Premium Call Center Agent						Location 3		
★ Auto Attendant Unlimited	Standard	AA	7827286255	9255		Call Center		Standard AA
★ Collaborate Bridge	Colab	Bridge	7827286262	9262		Call Center		Colab Bridge
★ Premium Contact Center Queue with TIX Unlimited	Premium	CC	7827286259	9259		Call Center		Premium CC
★ Audio Conferencing	Audio	Conf	7827286261	9261		Call Center		Audio Conf
★ DID	DID	DID	7827286208	9208		SIP Trunking		DID DID
★ DID	DID	DID	7827286206	9206		SIP Trunking		DID DID
★ DID	DID	DID	7827286273	9273		SIP Trunking		DID DID
★ DID	DID	DID	7827286267	9267		SIP Trunking		DID DID
★ DID	DID	DID	7827286268	9268		SIP Trunking		DID DID
★ DID	DID	DID	7827286265	9265		SIP Trunking		DID DID
★ DID	DID	DID	7827286271	9271		SIP Trunking		DID DID

## 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).

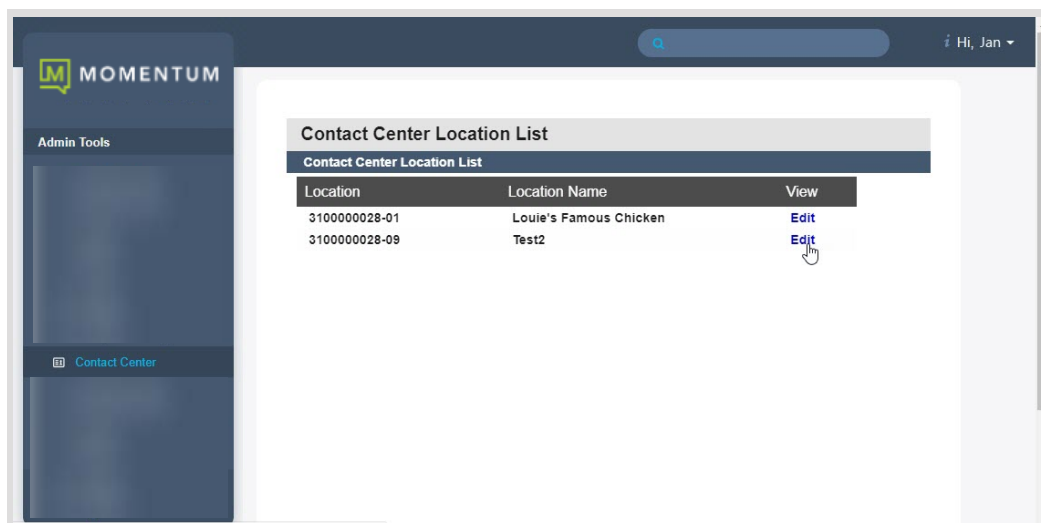
- **View/Edit** The drop down arrow ► next to an item opens the *Edit Settings* view.



## 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.

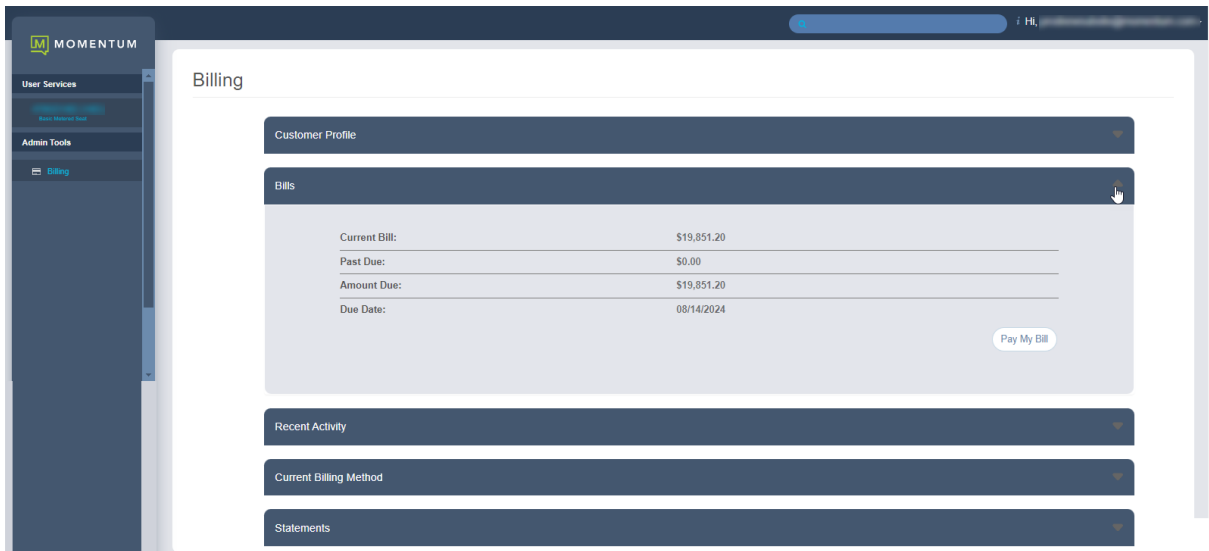


## \*BILLING

*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](#)

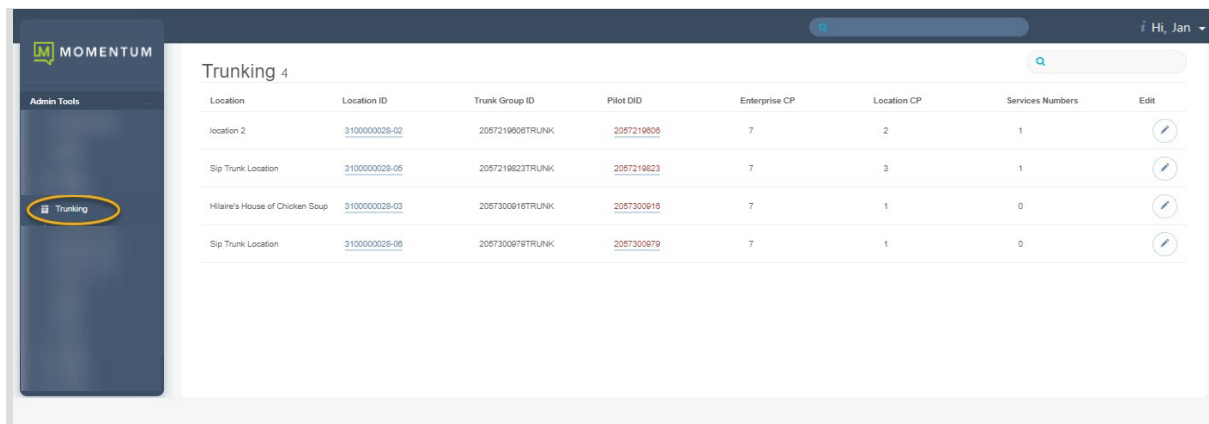


## TRUNKING

*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.

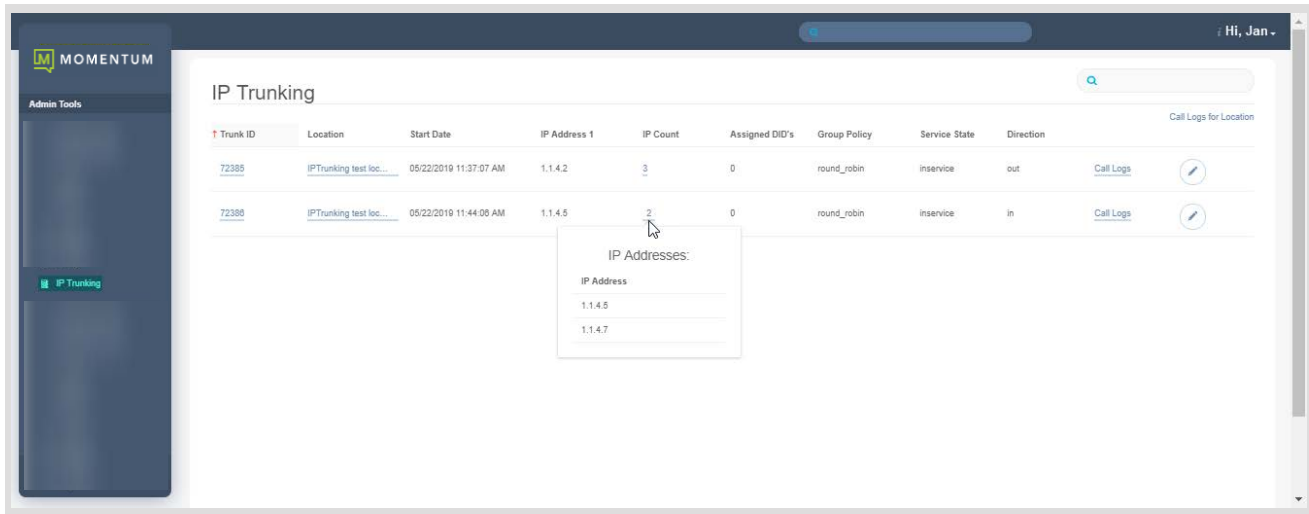


## IP TRUNKING

*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](#)

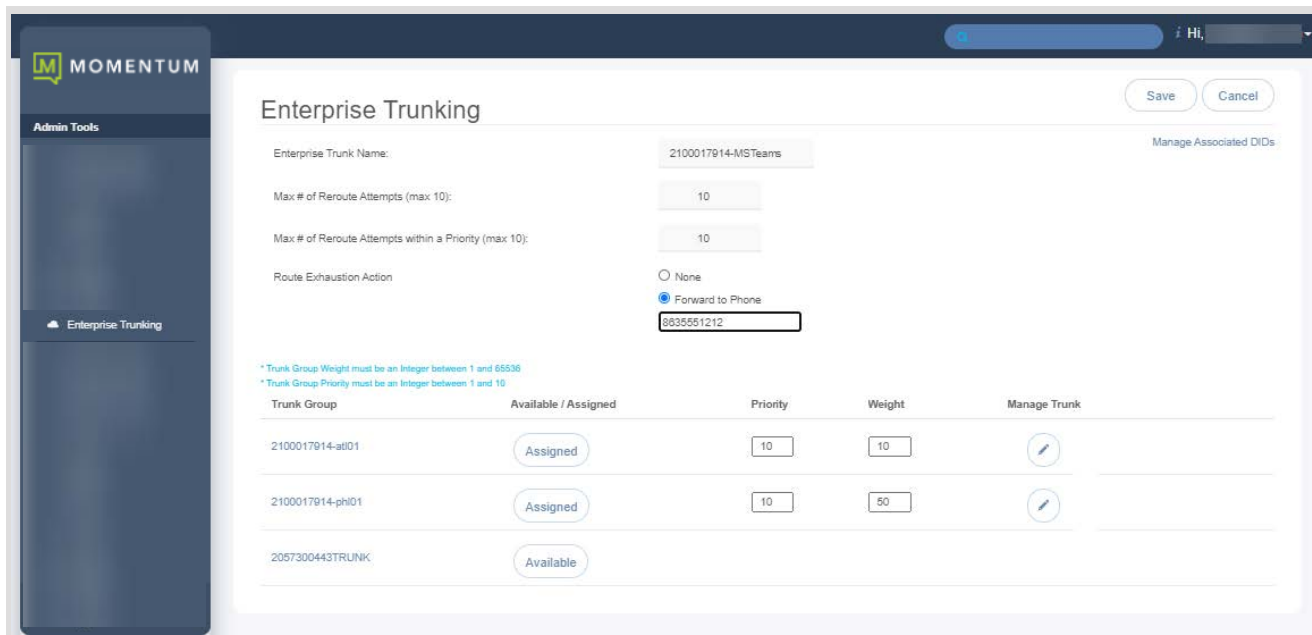


## ENTERPRISE TRUNKING

*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](#)

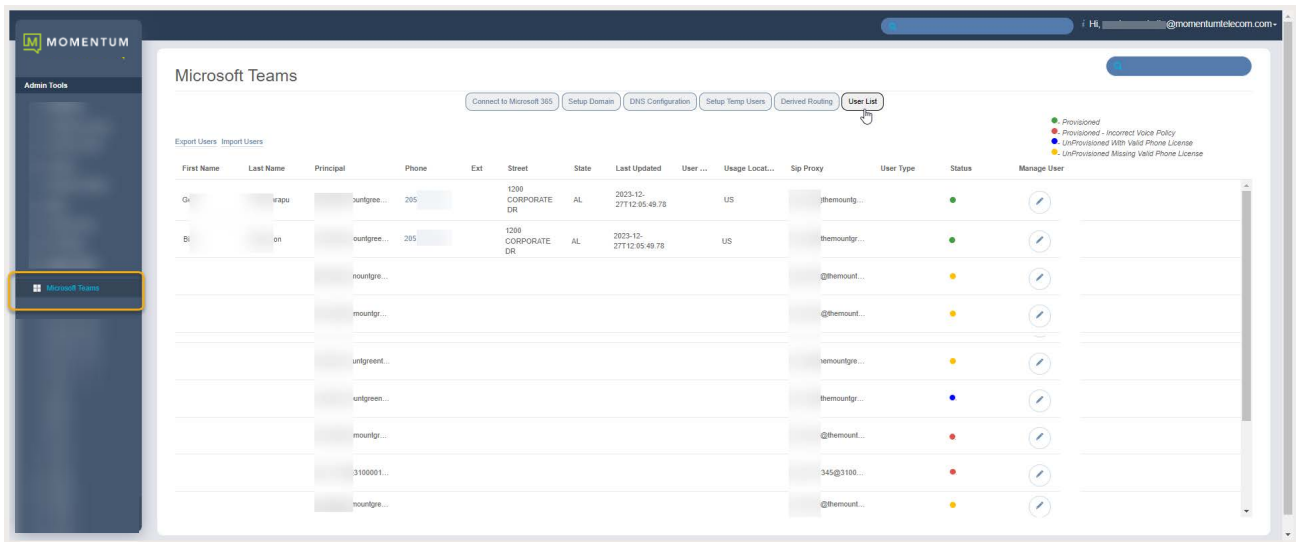


## TEAMS (MS or OC)

*Restricted Access for O365/MS Teams Administrators Only.*

A Teams section only displays for those organizations with integrated **Teams** services (Direct/Derived routing connector or Operator Connect), 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 and Resource Accounts tabs offer basic tools for MS Teams TN/Direct Routing setting management from this portal. *Teams-related setting and user administration tasks should be managed by an O365/MS Teams Admin with sufficient permissions via the organization's O365 / Teams Admin portal.* The available Teams section tools (Post-Deployment) include:

- Teams Deployment Info
- User TN / Derived Routing Assignment Access
- User/Phone List

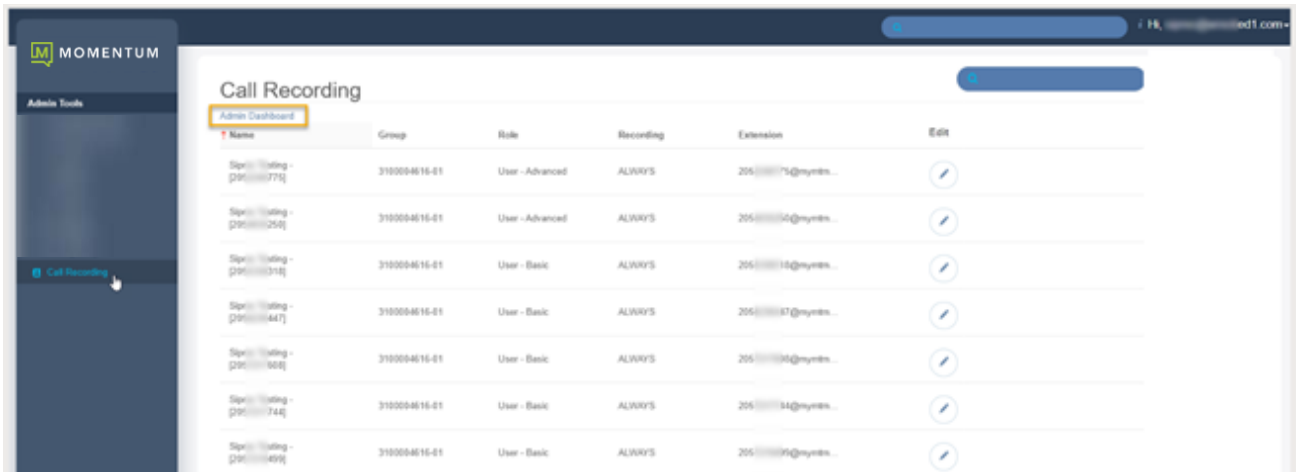


## CALL RECORDING

*Access to review and manage Broadsoft Call Recording license holder voice 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



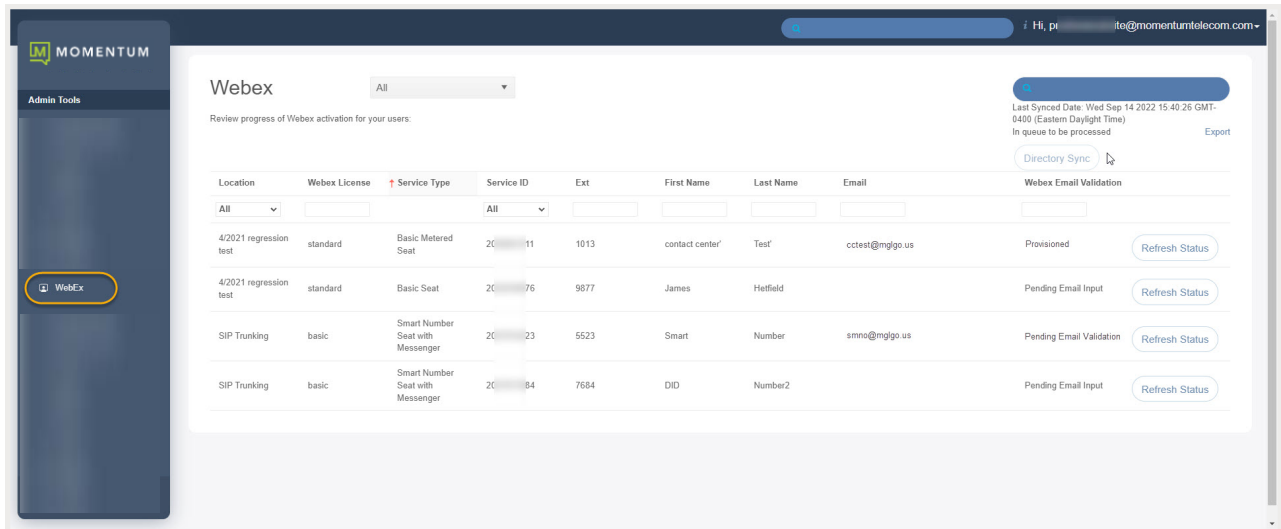


## WEBEX

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.

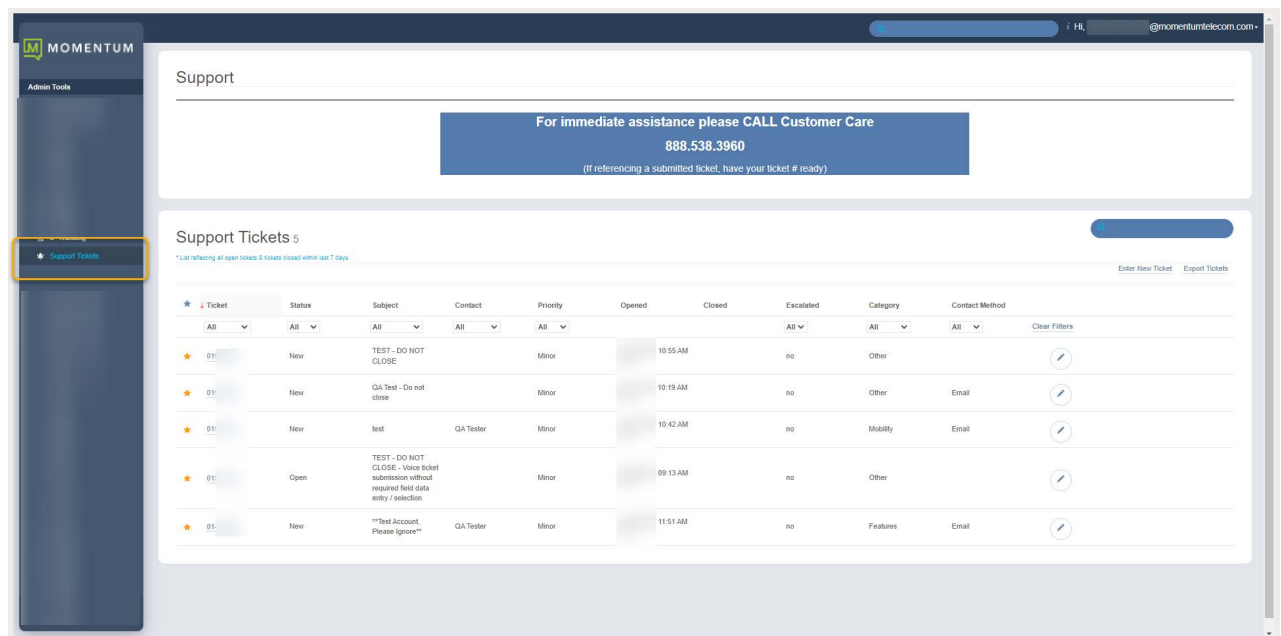
- [Search Table Contents](#)
- [Filter by Activation Status](#)
- [Sort Columns](#)
- [Refresh Status for Updates](#)
- [Directory Sync](#)



## \*SUPPORT TICKETS

Limited Access / Advanced Permissions required section.

The Support Tickets section displays only if the Admin has been granted permission to view it. Additional permissions required in order to be authorized to also submit minor tickets to Momentum Retail Support.



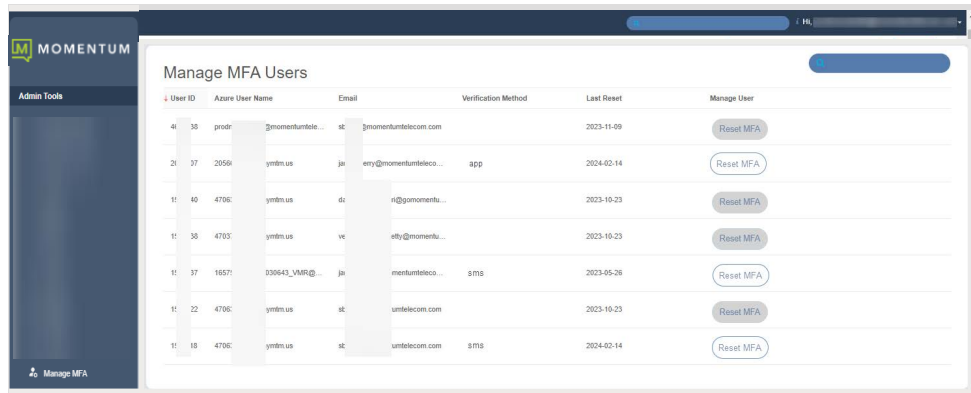


## \*MANAGE MFA

Data shown in this section is permission-based.

The **Manage MFA** section offers access to a searchable and sortable list view of the user and admin portal access accounts along with a **Reset MFA** tool that lets the Admin disconnect an account's current MFA protocol thus allowing the account holder to sign into the portal without using MFA (if MFA is Optional) OR setup a new MFA protocol again during the next sign in attempt (if MFA is Mandatory). The data in this page is populated as account holders set up their MFA protocols during sign in or via their account profile.

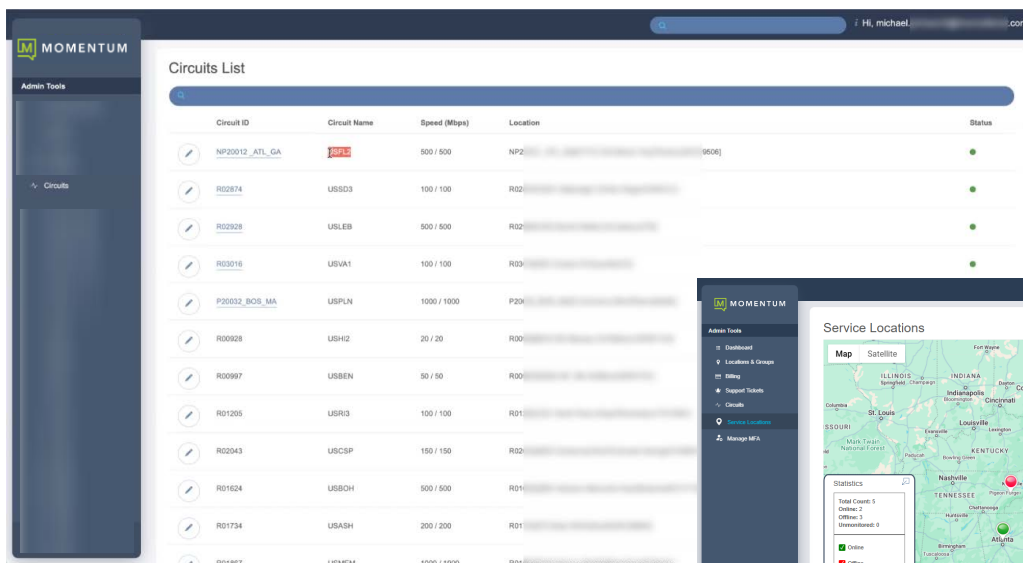
**Note:** Only the Portal Account Holder can set up the Multi-Factor Authentication protocol they'll use to log into their account.



## \*Circuits & Service Locations

Data/Managed Network Customers ONLY.

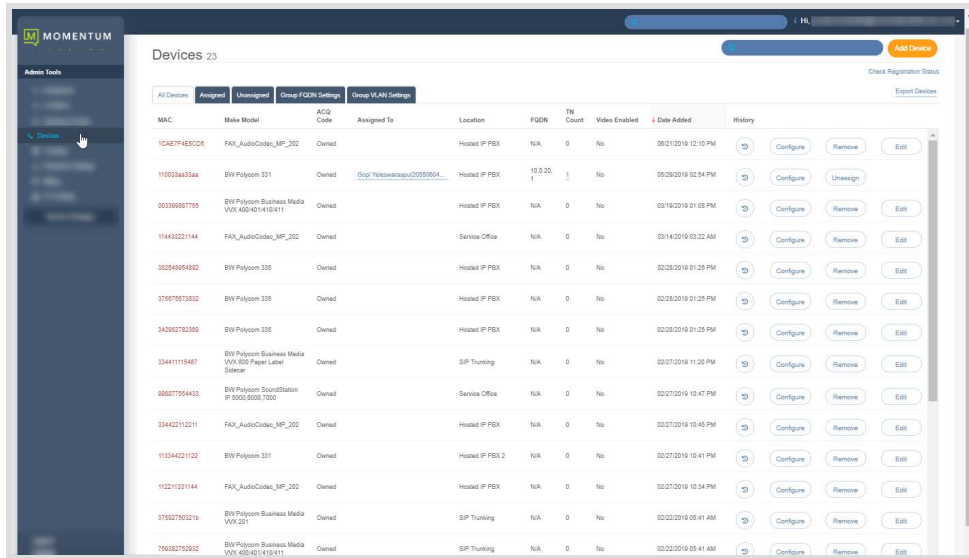
The **Circuits** page displays a list of circuits that are currently in inventory and active with the Service Provider. If Monitoring service was purchased, status indicators display red (down) or green (up). Gray = known/unmonitored. Additional tools require authorization. **Service Locations** offers a helpful Mapped view of known circuits with tools for reviewing more status details if monitored.



## \*DEVICES

**Restricted - Service Provider Level. Support/SLA Impacting. Advanced additional training required prior to access.**  
 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 - Service Provider Level. Support & Billing Impacting. Advanced additional training required prior to access.**  
 Perform some simple single-process orders and assignment 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/authorized Admins to Move, Add, and Change account services and review order status information.

