



MY CLOUD SERVICES PORTAL

Administrator Guide



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WELCOME

Welcome to the Vexus Fiber family. We are thrilled to be working with you!

We also want to welcome you to the My Cloud Services Portal.

The Vexus Team is constantly developing ways to improve your experience and offer new communications management tools that increase your productivity and make it easy to do what you do.

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

Thank you for letting us help you communicate!

Sincerely,
Vexus Fiber Telecom Team

Introduction

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

We encourage you to take some time to review this document and keep it handy for future reference. Should you need further assistance, please reach out to us. We are always here to help you with fast, courteous, and professional support. The entire Vexus Team is committed to doing everything possible to deliver an exceptional experience, and we strive to improve every day.

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

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

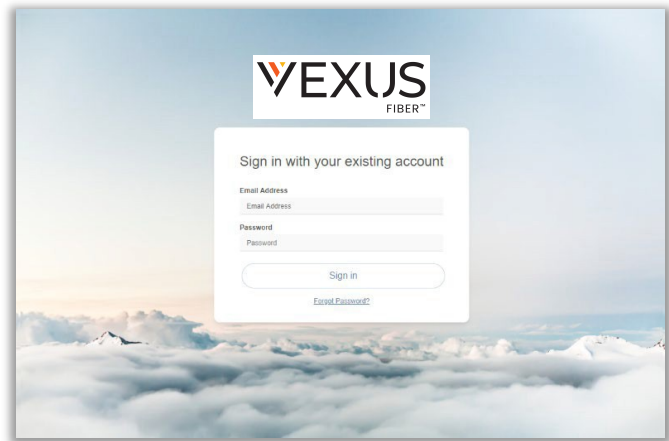
Access the Portal

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

Sign In

To Access the My Cloud Services Portal:

1. Open a web browser and enter the URL (web address) provided for online account management. Example: www.telecloud.vexusfiber.com
In most cases your initial Admin sign in credentials will be provided via email. If you need assistance for initial sign in (first time login), please contact your System Administrator or Account Manager at the Service Provider.
2. Enter the Admin Account Username and Password credentials.
 - ❖ Use the [Forgot Password?](#) link to retrieve portal sign in credentials.
3. Click the [Sign In](#) button and My Cloud Services Portal opens.



Terms and Conditions

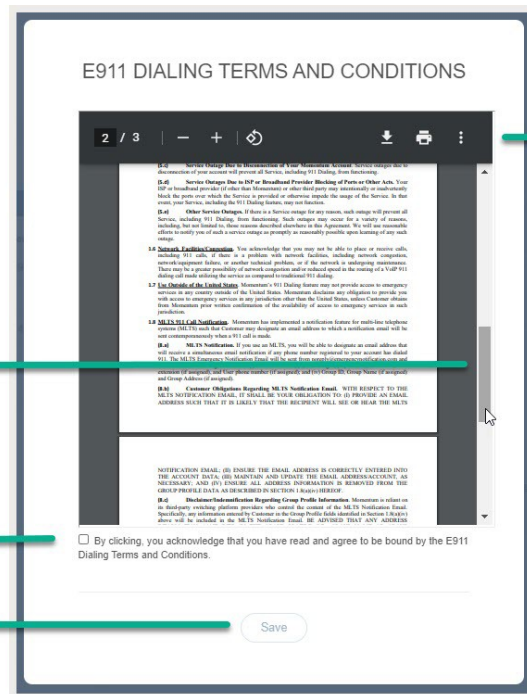
The first time an Admin accesses the portal an E911 Dialing Terms and Conditions acknowledgment dialog displays that must be completed to proceed.

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

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

Once you sign into the [My Cloud Services Portal](#) the first time and acknowledge the terms and conditions, access to the tools and features you need to easily manage your communications features are right at your fingertips.

1. Scroll through the document
2. Click within the Checkbox
3. Click Save



Toolbar
Pages 1/3
- / + Font Size
Reset Font Size
Download PDF
Print to PDF/File
More View Options

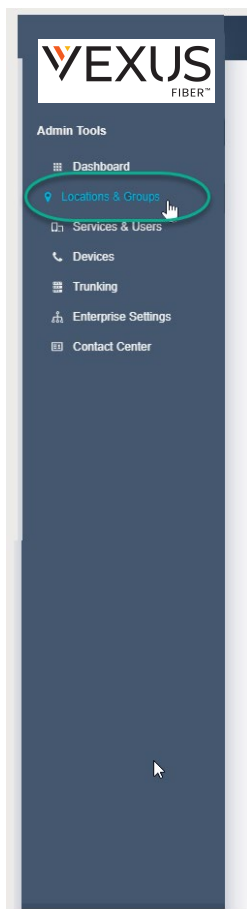
ADMIN TOOLS

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

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

The **Admin Tools** are user specific. The Navigation Menu Panel can include the following optional sections:

NOTE: Your role and/or authorization level determine the sections and features you may access, review, and manage.



- ❖ **Dashboard** – The home page for Administrators
- ❖ **Locations & Groups** – Location and Group level feature management
- ❖ **Services & Users** – User Account list and access to individual user settings
- ❖ **Trunking** – Review and manage SIP Trunk settings
- ❖ **Enterprise Settings** – Manage enterprise-level services and features
- ❖ ***Contact Center** – Limited Access. Administer Contact Center setup
- ❖ ***Billing – Restricted Access.** Advanced Billing information and payment management.
- ❖ ***IP Trunking – Restricted Access.** Advanced specialized Trunk Group management
- ❖ ***Enterprise Trunking – Restricted Access.** Specialized Enterprise Trunk Group configuration management for specially trained/authorized Admins
- ❖ ***Devices – Restricted Access.** Advanced access to manage device inventory on the account. Requires additional training prior to access.
- ❖ ***Service Changes – Restricted Access.** Advanced service change order management tools. Requires additional training prior to access.
- ❖ ***Microsoft Teams – Restricted Access.** Advanced Teams User TN / Direct Routing assignment management tools for MS 365/Teams Admins.

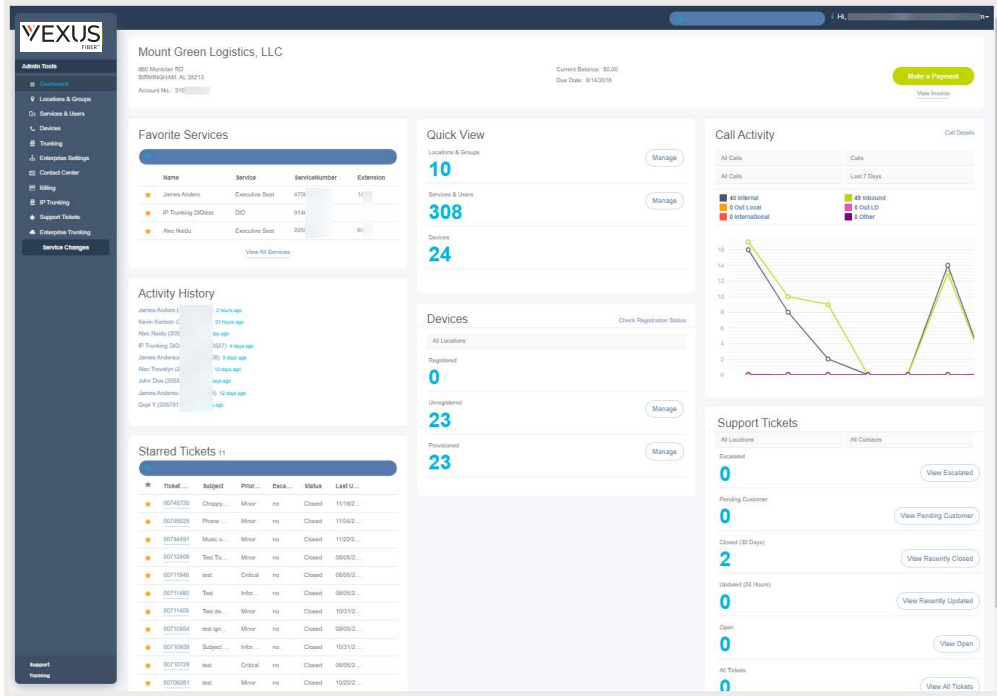
Restricted sections and their tools only display to specially trained and authorized Administrators with sufficient access permissions.

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

For your security, the connection to the portal will automatically close and return to the Sign In page if it is idle for more than 10 minutes.

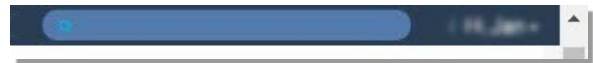
Dashboard

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



Site Search

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



Admin Information

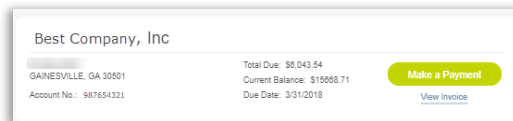
The **Hi, <User Name>** area at the top of the application opens a drop-down list of quick access links to view your current user profile dashboard, go to the [Support](#) or [Training](#) pages, and to Log Out.

Admin Dashboard Sections

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

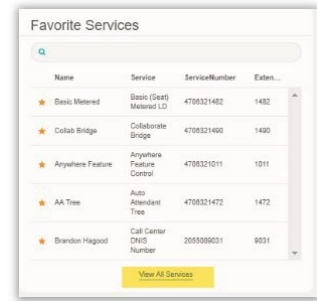
Billing Profile

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



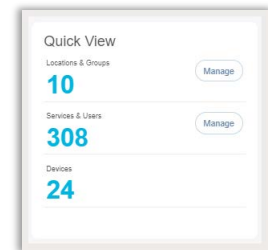
Favorite Services

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



Quick View

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



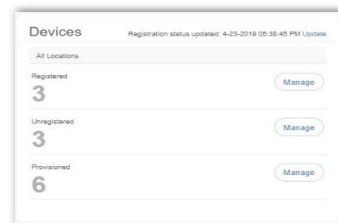
Call Activity

This section provides a quick graphical view of call data, with filtering tools to select specific call data for review by location, call type, date range, etc. This dashboard section offers useful 'mouse-over' details of the statistics within the dashboard and a [Call Details](#) link to review filterable call log data, plus the ability to [Export Call Logs](#) to a .csv spreadsheet format for reporting. *Note: To reduce the number of very large database searches that would slow response times in the portal when viewing Call Details logs, if the call log list grows to over 10,000 records returned, the system will display a message that the Export Call Logs tool should be used to allow for off line review of such a large request for data.*



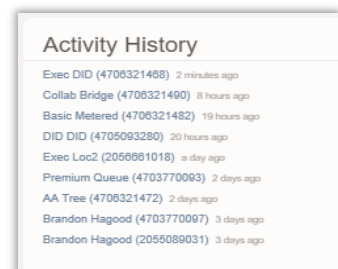
Devices

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



Activity History

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

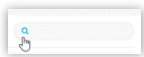


Locations & Groups

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

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

Section Search



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

Column Links

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

Edit



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

Emergency Call Notification Email

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

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

While viewing the Locations & Groups page:

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

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

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

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

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

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


See 911 Address List

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

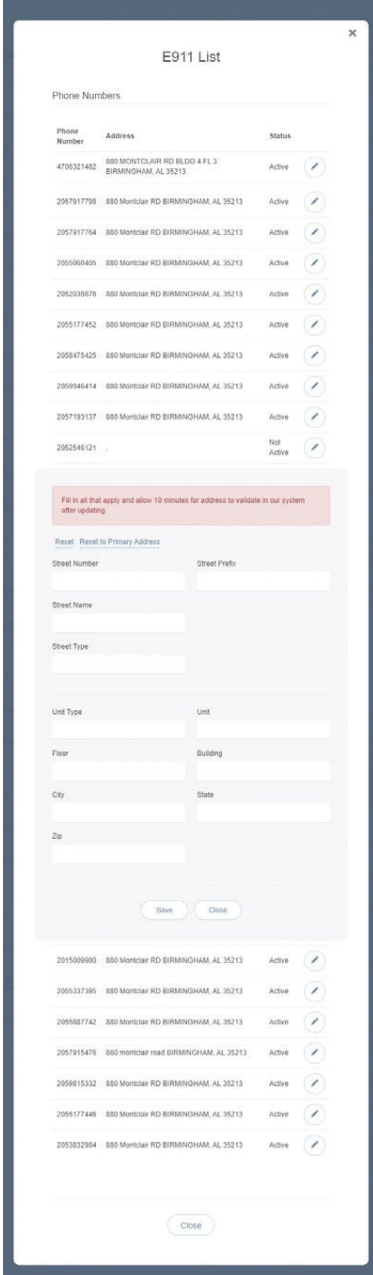
Note: Any e911 address entered/modified by an Admin or User from this portal and successfully updated in the Public Safety Answering Point (PSAP) system is used by Emergency Services and should include details that will help first responders to quickly find the location of the person who placed a 911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

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

While viewing the Locations & Groups Page:

- Click on the [See 911 Address List](#) link adjacent to a Location listing.
- Click on the Edit  icon adjacent to a desired listing to make changes.
- Perform one or more of the following actions:
 - ❖ **Reset:** Click this link to clear the fields and enter correct information below.
 - ❖ **Reset to Primary Address:** Click this link to apply the Location's Primary Address information as this user's e911 address.
 - ❖ Enter the correct information in each field (as needed) to update or add new e911 address information for the user assigned to the TN.

Note: Complete the specialty fields for unit type, floor, building, etc. to enhance the details of the e911 address on file and ensure that there is a **Dispatchable Location** delivered to the PSAP with a 911 call from that line that consists of the validated street address of the calling party, plus additional information such as suite, apartment, building, floor, or similar information necessary to adequately identify the location of the calling party for first responders and speed up response time during emergencies.
- Click **Save** to update the system with the new information or click **Close** to collapse the view without making changes. *Once saved, the PSAP system will validate the new address information and update. This validation process takes approximately 10 minutes to complete for an address. A **success** message displays when that process completes and the address is registered to the phone number.*
- Click **Close** when finished or click outside the dialog to exit the e911 List and return focus to the Locations & Groups list.



The screenshot shows the 'E911 List' interface. At the top, there's a title 'E911 List' and a close button. Below it, a table lists 'Phone Numbers' with columns for 'Phone Number', 'Address', and 'Status'. The table contains several rows of data, including phone numbers like 4700321402, 2057917700, 2057917754, 2050606005, 2052038076, 2055172452, 2058475425, 2059946414, 2057193137, and 2052546121. Each row has a status (Active or Not Active) and a checkmark icon.


Below the table, there's a modal form for editing address details. The form has a title 'E911 List' and a close button. It contains a warning message: 'Fill in all that apply and allow 10 minutes for address to validate in our system after updating.' Below this, there are fields for 'Street Number', 'Street Prefix', 'Street Name', 'Street Type', 'Unit Type', 'Unit', 'Floor', 'Building', 'City', 'State', and 'Zip'. There are 'Save' and 'Close' buttons at the bottom of the form.

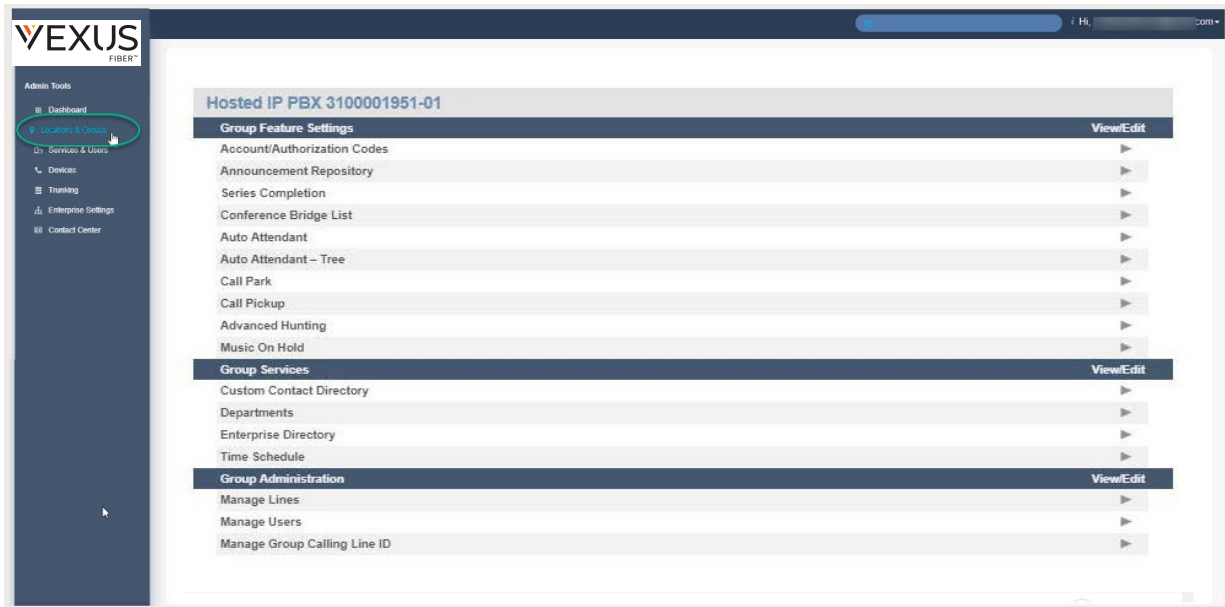


Some e911 address management tasks require intervention by the Service Provider to complete. An Authorized Contact for your organization should communicate with their assigned Service Provider contact (AM/PM or the Customer Support team) to request assistance with those changes that are not self-managed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

Access Group Settings by Location

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


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



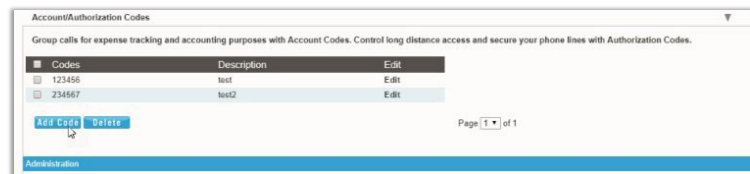
Admins may have access to work with multiple feature settings in Locations & Groups.

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

Account / Authorization Codes

Manage setup and usage of Account and Authorization Codes. *Only one type of code may be used at a time per Location.* Basic Instructions for setup are provided via the  [See instructions](#) link.

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



Add an Account or Authorization Code

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

Account / Authorization Code Administration

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

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

Edit an Account / Authorization Code

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

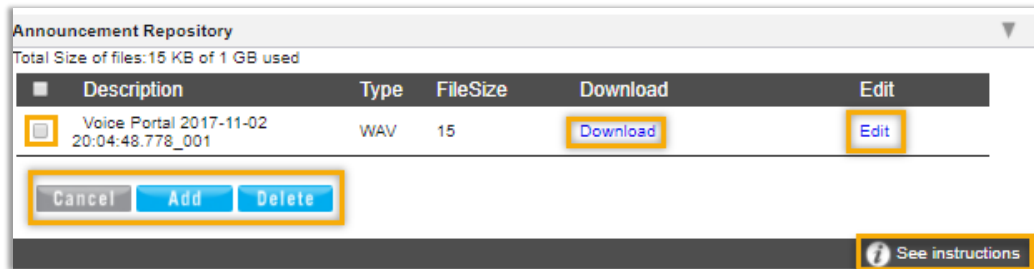
View Account / Authorization Code Reports

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

Announcement Repository

Manage the announcements and greetings that are available for selection by the group. This feature offers the ability to upload and store announcements and messages. Files uploaded and stored in the group Announcement Repository are available within selection lists when setting up Voicemail greetings and announcement messages.

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



The repository offers up to 1 GB of storage space. The total amount of storage that has been used displays for review.

Maximum file size for audio announcements is 5 MB in CCIT u-Law 8kHz, 8-bit Mono format.

Basic Instructions and file size requirements are provided via the [See instructions](#) link in the Edit view.

Add an Announcement File

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

Download an Announcement File

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

Edit an Announcement File

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

Delete an Announcement File

Caution: This action is immediate and cannot be undone.

1. Click to place a check in the box next to an Announcement.
2. Click on the [Delete](#) button. The removal action is immediate and cannot be undone.

Auto Attendant

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

Basic instructions are provided via the See Instructions link in the settings dialog.  [See instructions](#)

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


Edit Auto Attendant Basic Settings

1. Click on the [Edit](#) link next to the Auto Attendant listing to review the current settings.

2. Make the following changes, *as needed*:

- ❖ **Active:** Click within the check box to set to Active or to disable the Auto Attendant.
- ❖ **Name:** Type a name that displays in lists for selection.
- ❖ **Calling Line ID First Name / Last Name:** Type the name that will show on Caller ID for this Auto Attendant
- ❖ **Time Zone:** Select the appropriate time zone where the Auto Attendant (or Location/Group) resides.
- ❖ **Business Hours:** Select the appropriate option from the drop-down menu.
- ❖ **Holiday Schedule:** Select the appropriate option from the drop-down menu.
- ❖ **Scope of extension dialing:** Select Enterprise or Group.
- ❖ **Scope of name dialing:** Select Enterprise or Group.

Phone Number	Extension	Edit
4703770098	0098	Edit

Page 1 of 1 

Edit Auto Attendant

Auto Attendant 1389371 Number: 4703770098

Active

Name:

Calling Line ID First Name: Calling Line ID Last Name:

Time Zone:

Business Hours: Holiday Schedule:

Scope of extension dialing: Enterprise Group

Scope of name dialing: Enterprise Group

[Set Business Hours Prompts](#) [Set After Hours Prompts](#)

[Save](#) [Cancel](#)

3. Click [Save](#) to submit the changes and return the Auto Attendant list.

Edit Auto Attendant Business Hours Prompts

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

Edit Auto Attendant After Hours Prompts

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

Auto Attendant – Tree

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

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

Edit Auto Attendant Tree Advanced Settings

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

Phone Number	Extension	Edit
4706321472	1472	Edit

Page 1 of 1 [See instructions](#)

Auto Attendant 1380294 Number: 4706321472

Active

Name: Auto Attendant 1380294

Calling Line ID First Name: AA Calling Line ID Last Name: Tree

Department: -Select Department- Language: English

Time Zone: (GMT-05:00) (US) Central Time Network Class of Service: -Network Class Of Service-

Enable video support

Scope of extension dialing: Enterprise Group Department

Scope of name dialing: Enterprise Group Department

Name Dialing Entries: LastName + FirstName LastName + FirstName and FirstName + LastName

* Transfer to the operator after: 10 seconds of inactivity

[Set Business Hours Prompts](#) [Set After Hours Prompts](#) [Set Holiday Prompts](#) [Submenus](#)

[Save](#) [Cancel](#)

Set Auto Attendant Tree Business Hours Prompts

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

Set Business Hour Prompts for Auto Attendant 4706321472

Default Greeting

Personal Greeting upload

test (Group)

Enable first-level extension dialing

Auto Attendant Prompt Descriptions

Description:	Action:	Telephone Number
0 1	Transfer To Operator	8970
1 2	Extension Dialing	
2 3	Name Dialing	
3	...	
4	...	
5	...	
6	...	
7	...	
8	...	
9	...	
*	...	
#	...	

[Save](#) [Cancel](#)

Set Auto Attendant Tree After Hours Prompts

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

Description:	Action:	Telephone Number
0 1	Transfer To Operator	8979
1 2	Extension Dialing	
2 3	Name Dialing	
3	---	
4	---	
5	---	
6	---	
7	---	
8	---	
9	---	
*	---	
#	---	

Set Auto Attendant Tree Holiday Prompts

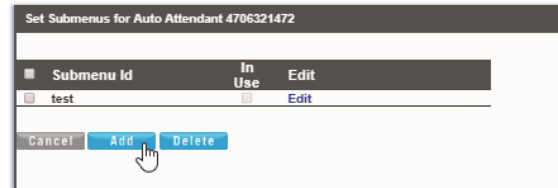
1. Click on the [Edit](#) link next to the Auto Attendant – Tree listing to review the current settings.
2. Click on the [Set Holiday Prompts](#) button.
3. Select **Default Greeting** or **Personal Greeting upload** and choose a greeting from the pre-defined list in the drop-down menu. (These greetings were uploaded previously into the [Announcement Repository](#)).
4. Click to place a check next to **Enable first-level extension dialing**, to allow callers to dial an extension or a phone number.
5. **Holiday Schedule:** Optional. A Personal Greeting upload required. Choose the schedule from the drop-down options.
Note: *The Personal Greeting upload will be overridden by the Start Announcements defined in each holiday schedule event as they trigger.*
6. Enter up to 12 Auto Attendant Prompt Descriptions, Actions, and where *Play Announcement* is the selected Action, choose an announcement, as needed.
7. Click the [Save](#) button to submit the changes and return to the Auto Attendant [Edit](#) view.
8. Click the [Save](#) button to update the system with the new Auto Attendant settings and return to the Auto Attendant list.

Description:	Action:	Telephone Number
0 1	Transfer To Operator	8979
1 2	Extension Dialing	
2 3	Name Dialing	
3	---	
4	---	
5	---	
6	---	
7	---	
8	---	
9	---	
*	---	
#	---	

Add Auto Attendant Tree Submenus

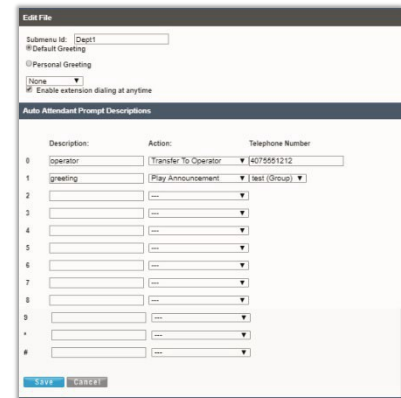
The advanced settings in **Auto Attendant – Tree** offer the ability to create one (1) overall Auto Attendant PLUS multiple Auto Attendants under it that can be set up to handle calls or specific work for locations, groups or departments, and more.

1. Click on the **Edit** link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the **Submenus** button to open the *Set Submenus for...* dialog.
3. Click on the **Add** button to begin creating a new Auto Attendant *Submenu*.
4. Define the following, as needed:
 - ❖ **Submenu ID:** Type a name that displays in lists.
 - ❖ Select **Default Greeting** or **Personal Greeting** upload and choose a greeting from the drop-down menu.
 - ❖ Click within the check box to **Enable extension dialing at any time**.
 - ❖ Add Auto Attendant Prompt Descriptions and Actions for each line (up to 12), as needed.
5. Click **Save** to submit the changes and return the Auto Attendant list. Repeat to add more Auto Attendant - Tree Submenus.



Edit Auto Attendant Tree Submenus

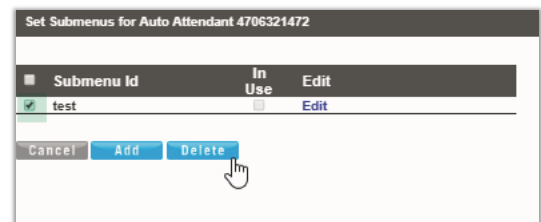
1. Click on the **Edit** link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the **Submenus** button to open the *Set Submenus for...* dialog. Click on the **Edit** link next to the Submenu.
3. Modify the settings or prompts, as needed.
4. Click the **Save** button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



Delete Auto Attendant Tree Submenus

Caution: This action is immediate and cannot be undone.

1. Click on the **Edit** link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the **Submenus** button to open the *Set Submenus for...* dialog.
3. Click within the check box next to the Submenu you wish to delete from the list.
4. Click on the **Delete** button to remove the selection and close the *Set Submenu for...* dialog.



Outbound Caller ID

Manage the Caller ID that is shown for outbound calls from users/devices assigned to the Trunk Group. While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

Manage Outbound Caller ID

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

Series Completion

This service provides key Hunt Group functionality by allowing the Admin to assign users' lines. The system will hunt through this set of lines according to the pre-defined order and availability. While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

Add Series Completion

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

Edit Series Completion

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

Delete Series Completion

Caution: This action cannot be undone.

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

The selected item is immediately removed.

Conference Bridge List

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

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

Manage Conference Bridge List

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

The image shows two screenshots from a web interface. The top screenshot is titled "Conference Bridge List" and shows a table with columns for Name, Phone Number, Extension, and Edit. The table contains one entry: "Meet-Me CNF 1399795" with Phone Number "2055585492" and Extension "5492". The bottom screenshot is titled "Edit Conference Bridge" and shows a form with fields for Name, Calling Line Id First Name, Calling Line Id Last Name, and Operator Phone Number. It also has two lists: "Available Users" and "Conference Moderators". The "Available Users" list includes "2055022523@mymtm.us (Hagood Brandon)" which is highlighted. The "Conference Moderators" list includes several entries like "4705093291@mymtm.us (DID DID)". There are "Save" and "Cancel" buttons at the bottom.

Instant Conference

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

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

Manage Instant Conference

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

The image shows two screenshots from a web interface. The top screenshot is titled "Instant Conference" and shows a form with fields for Group Name, Extension, and Name. The bottom screenshot is titled "Edit Instant Conference" and shows a form with fields for Name, a checkbox for "Enable Maximum Time for Unanswered Calls", and a table for "Enter the numbers that should be included in this Instant Conference". There are "Save" and "Cancel" buttons at the bottom.

Call Park (Groups)

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

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

Manage Call Park Group Default Settings

1. Select or Enter the following:

Settings for Call Park:

- ❖ Alternate User Recall To: Choose a user type.

Settings for Group Call Park:

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

Settings for All Parked Calls:

- ❖ Ring Pattern for Recalled Calls: Select an option from the drop-down menu.
- ❖ Recall Timer: Set an amount of time (from 30-600 seconds).
- ❖ Alert Alternate Recall User Wait Time: Set an amount of time (from 30-600 seconds).

2. Click the [Save](#) button to submit the default settings and close the dialog.

Add a Call Park Group

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

Edit a Call Park Group

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

Optional: Click the [Edit](#) option next to a Group in the list.

1. Modify the Group Name, Recall To, or User assignments.
2. Click the [Save](#) button to submit the changes.

Delete a Call Park Group

Caution: This action is immediate.

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

Call Pickup (Groups)

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

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

Add a Call Pickup Group

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



Manage Call Pickup Groups

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

Or
2. **Use Caution:** This action is immediate and cannot be undone. Click the **Delete** button to instantly remove the group from the system and close the dialog.

Advanced Hunting

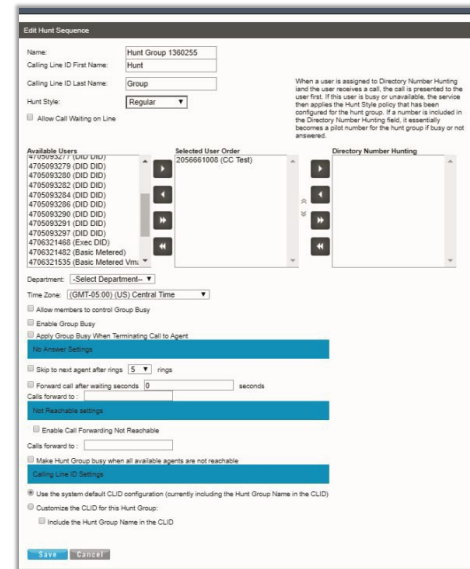
Utilize all your lines and prevent unnecessary busy signals. When a call is generated to a line that is busy, the call automatically rolls to the next number in the Hunt Group.

Manage Advanced Hunting Settings

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


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

- ❖ **Department:** Select the appropriate department from the drop-down selection list.
- ❖ **Time Zone:** Select the appropriate time zone for the group/location.
- ❖ **Allow Members to control Group Busy:** Click to **Enable** / **Disable**.



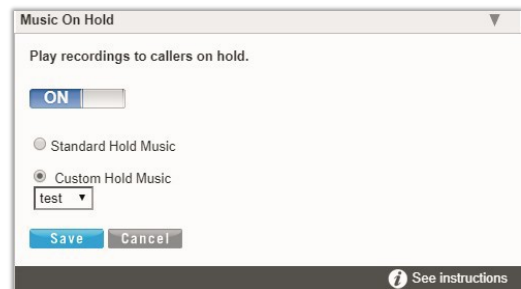
- ❖ Enable Group Busy: Click to Enable / Disable.
 - ❖ Apply Group Busy When Terminating Call To Agent: Click to Enable / Disable.
 - ❖ Skip to next agent after x rings: Click to Disable / Enable and select the amount of rings.
 - ❖ Forward call after waiting x seconds: Click to Disable / Enable and select the amount of seconds.
 - ❖ Enable Call Forwarding Not Reachable: Click to Enable / Disable.
 - ❖ Calls forward to: Enter the 10-digit phone number/SIP URI.
 - ❖ Make Hunt Group busy when all agents are not reachable: Click to Enable / Disable.
 - ❖ Use system default CLID: Click to Enable / Disable.
 - ❖ Customize the CLID for this Hunt Group: Click to Enable / Disable.
 - ❖ Include the Hunt Group Name in the CLID: Click to Enable / Disable.
3. Click the [Save](#) button to submit the new data and close the dialog.

Music On Hold


Manage the music or greeting files played to callers when placed on hold. Basic Instructions and file size requirements are provided via the [See instructions](#) link. While in the Settings page, click the adjacent  under View/Edit to open the [Edit](#) view.

Manage Music On Hold



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

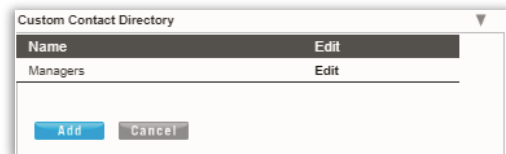
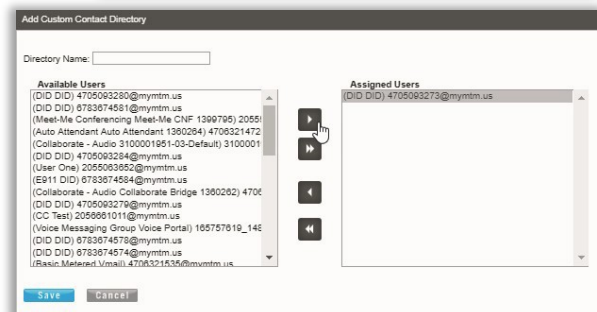


Custom Contact Directory

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

Add a Custom Contact Directory List

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

Edit a Custom Contact Directory List

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

Delete a Custom Contact Directory List

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

Departments

Manage Departments for the *Group/Location*.

Add a Department

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

The screenshot shows the 'Enterprise Services' interface. At the top, there is a 'Departments' table with columns for 'Department Name' and 'Edit'. The table contains two rows: 'Maintenance' and 'Maintenance | Plumbing'. Below the table are 'Add' and 'Cancel' buttons. A modal dialog titled 'Add Department' is open, showing a 'Department Name' field and an 'Edit' button.

Edit a Department

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

The screenshot shows the 'Add Department' dialog form. It contains the following fields: 'Department Name' (text input), 'Parent Department' (dropdown menu with 'None' selected), 'Department Calling Line ID Name' (text input), and 'Department Calling Line ID Number' (dropdown menu with 'None' selected). At the bottom are 'Save' and 'Cancel' buttons.

Delete a Department

Caution: This action is immediate and cannot be undone.

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

The screenshot shows the 'Edit Department' dialog form. It contains the following fields: 'Department Name' (text input with 'Maintenance' entered), 'Parent Department' (dropdown menu with 'None' selected), and 'New Department Name' (text input). At the bottom are 'Save', 'Delete', and 'Cancel' buttons.

Enterprise Directory

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

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

Print Enterprise Directory Summary

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

Print Enterprise Directory Details

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

Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID
3100001951-02-Default (Collaborate - Audio)						3100001951-02
3100001951-03-Default (Collaborate - Audio)						3100001951-03
3100001951-04-Default (Collaborate - Audio)						3100001951-04
3100001951-05-Default (Collaborate - Audio)						3100001951-05
Auto Attendant 1350254 (Auto Attendant)	4708321472	1472				3100001951-01
Auto Attendant 1350371 (Auto Attendant)	4703770098	0098				3100001951-01
BroadWorks Anywhere 1350257 (BroadWorks Anywhere)	4708321011	1011				3100001951-01
Collaborate Bridge 1350282 (Collaborate - Audio)	4708321490	1490				3100001951-01
Conferencing 1350281 (Meet-Me Conferencing)	4703770082	0082				3100001951-01
DID.DID	4708083280	3280				3100001951-02
DID.DID	4708093291	3291				3100001951-02
DID.DID	4708093284	3284				3100001951-02

Time Schedule

The Location / Group [Time Schedule](#) feature allows Admins to set the group or location's schedules for business hours and holidays and define all events that are needed.

Calls that fall within these times can be sent to voicemail or receive a pre-defined greeting.

Time Schedule ON ▼

Business Hours Schedule Edit

Enterprise Test Edit

Cancel Add Delete

Holiday Schedules Edit

Thanksgiving Edit

Christmas Edit

Cancel Add Delete

See instructions

Add a Schedule

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

Delete a Schedule

Caution: This action is immediate and cannot be undone.

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

Add an Event

1. Click Edit next to the preferred schedule option in either Business Hours or Holiday Schedule.
2. Click Add Event to define the following options for a specific event type:

- ❖ **Event Name:** Required - Type a short title for review in lists.
- ❖ **Start Date/End Date:** Select the day the event begins and ends.
1 day event = Jan 3 - Jan 3
2 day event = Jan 3 - Jan 4
- ❖ Select the All Day Event check box , or Start Time, End Time.
Time = HH:MM
- ❖ Optional: Recurs – (Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week)
- ❖ Optional: Recur every x (Months or Year and/or the Numerical day of the month).
- ❖ Optional: End – Never, After (x # of occurrences), or Date (set the end date).

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

Edit an Event

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

Delete an Event

Caution: This action is immediate and cannot be undone.

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

Manage Lines

Manage the names and numbers associated with lines on the account.

While in the Locations > Settings page, click the adjacent ► arrow under View/Edit.

You may use the Search tools at the top to locate a listing by the data displayed within the Last Name, First Name, Phone Number, or Extension columns.

Click a column header to sort in ascending/descending alphanumeric order. The Close button exits the view.

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

Manage Users

Manage user access rights and extension assignments.

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

Manage User Password and Recovery Email

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

Add Users to Groups

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

Edit User Access and Extension

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

Assign Administrative Rights to a User

1. Locate the user you wish to modify within the list.
2. Click the [Edit](#) option next to the selected user.
3. Click within the [Assign Administrative Rights](#) to enable.
4. Click the [Save](#) button to submit the changes and close the dialog.

Assign Contact Center Manager Rights to a User

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

Set Advanced Administrator Permissions

Additional Administrator permissions required for access to review and manage the information and tools within the restricted access sections such as [Service Changes](#), [Devices](#), and [Billing](#) sections and Dashboard views may be defined for an Admin User by an Authorized Administrator. Each enabled assignment provides access to view or manage specific features or tools in the restricted areas when logged into the Portal as an Admin. By default, all restricted area features are **not** enabled for use by *any* Admin and these permissions must be enabled by the provider and setup manually by an Authorized Admin or the Super Admin after training has been completed. Contact your organization's Super Admin who must work with the Service Provider for assistance.

While working in Manage Users:

1. Locate a User in the list with the Admin column set to **Yes**.
2. Click on the [Edit](#) option next to the selected user.
3. Click on the [Advanced Admin Permissions](#) link to review and edit the *Advanced Admin Permission* settings.
4. **Service Changes Permissions - (MACD) RESTRICTED ACCESS**
Click within the listed check boxes to enable or disable appropriate [Service Changes](#) section and feature access.
5. **Devices (Provisioning) – (RESTRICTED ACCESS)**
Click within the listed check boxes to enable or disable appropriate administrative device management access in the *Devices* section.
6. **Billing – (RESTRICTED ACCESS)**
Note: *This option only displays in systems that have Location level Billing enabled for use by the provider and the selected Admin has permissions as a Location/Group level Admin.*
Click within the listed check box to enable or disable this Admin as a location level billing admin with the ability to review and manage bill payments for specifically assigned locations.
7. Click the [Save](#) button to submit the changes, close the dialog, and return to the *Edit User* view.

Delete Users

Caution: This action is immediate and cannot be undone.

While working in *Manage Users*:

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

Manage Group Calling Line ID

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

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

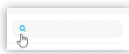
1. Define or select from the following options, as needed:
Use Group name for Calling Line Identity: Click within the check box to Enable
2. If set to Enabled, make selections from the following, as needed:
 - ❖ Calling Line ID Group Name: Enter the group name that displays in Caller ID
 - ❖ Calling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

Services & Users

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

Service Type	First Name	Last Name	Service ID	Extension	MAC	Location	Dept	Assigned To
★ Anywhere Feature Control	anywhere	control	7527280287	9287		Call Center		anywhere control
★ DID	DID	DID	7527280287	9287		SIP Trunking		DID DID
★ Basic Managed Desk with Voicemail or DID	Basic	M Vmeal	7527280293	9293	a54054155cd6	Call Center		Basic M Vmeal
★ Auto Absentist Tree	AA	Tree	7527280293	9293		Call Center		AA Tree
★ Premium Call Center Agent						Location 3		
★ Auto Absentist Unlimited	Standard	AA	7527280395	9295		Call Center		Standard AA
★ Collaborate Bridge	Collab	Bridge	7527280292	9292		Call Center		Collab Bridge
★ Premium Contact Center Queue with TR Unlimited	Premium	CC	7527280290	9290		Call Center		Premium CC
★ Audio Conferencing	Audio	Conf	7527280291	9291		Call Center		Audio Conf
★ DID	DID	DID	7527280298	9298		SIP Trunking		DID DID
★ DID	DID	DID	7527280290	9290		SIP Trunking		DID DID
★ DID	DID	DID	7527280273	9273		SIP Trunking		DID DID
★ DID	DID	DID	7527280297	9297		SIP Trunking		DID DID
★ DID	DID	DID	7527280296	9296		SIP Trunking		DID DID
★ DID	DID	DID	7527280295	9295		SIP Trunking		DID DID
★ DID	DID	DID	7527280271	9271		SIP Trunking		DID DID

Section Search



Locate any data found within the table below.

Check Registration Status

Poll NEPS and BroadSoft provisioned device registration status and update.

Favorites ★

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

Service ID & Ext

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

Manage Services & Users

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

The screenshot displays a user dashboard for Carin Smith, a Calling Line ID user for MOMENTUM TELECOM. The dashboard is divided into several sections:

- User Profile:** Displays personal and contact information such as User ID, Enterprise ID, Department, Service Number, Network Class of Service, E911 Address, and Mobile Address. It includes a "View Profile" button.
- Voicemail:** Shows a "No recent voicemails" message and buttons for "Voicemail Settings", "Manage Greetings", and "Reset Voicemail Pin".
- Basic Features:** Lists various features with On/Off toggle switches, including Anonymous Call Rejection, Caller ID, Call Waiting, Connected Line ID Restrictions, Do Not Disturb, and Outbound Caller ID Block.
- Call Logs:** A table showing the latest calls. The table has columns for Direction, Caller ID, Phone, Date, and Time. It lists several incoming and outgoing calls with their respective details.
- Applications:** A section indicating that no applications are currently available for this user.

User Profile

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

Voicemail

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

Call Logs

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

Applications

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

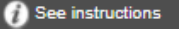
Basic Features

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

Working with User Settings

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

Settings		
Profile		VIEW/EDIT
General		
Anonymous Call Rejection	ON/OFF	VIEW/EDIT
Announcement Repository	OFF	▶
Call Block	OFF	▶
Caller ID	ON	▶
Call Notify	OFF	▶
Call Waiting	OFF	▶
Connected Line Identification Restriction	OFF	▶
Do Not Disturb	ON	▶
Hoteling Guest	ON	▶
Hoteling Host	ON	▶
Outbound Caller ID Block	ON	▶
Priority Alert		▶
Privacy		▶
Selective Call Acceptance	ON	▶
Speed Dial		▶
Forwarding		
Call Forwarding Selective	ON/OFF	VIEW/EDIT
Find Me - Simultaneous Ring	OFF	▶
Find Me - Sequential Ring	ON	▶
Push to Talk	OFF	▶
Push to Talk	ON	▶
Messaging		
Wicemail	ON/OFF	VIEW/EDIT
Distribution List	ON	▶
Reset Wicemail Pin		▶
Mobility		
Anywhere		VIEW/EDIT
Use Subphone	ON/OFF	VIEW/EDIT
Enterprise Directory		▶
Time Schedule	ON	▶

- ❖ Features are generally grouped by type to make similar or related features easy to locate.
- ❖ On/Off features show their current status within the table.
- ❖ The arrow ▶ under the [View/Edit](#) column (far right) for a feature opens the [Edit](#) view.
- ❖ While viewing a feature's setting details, the  icon at the bottom of the view provides access to helpful information about setup and/or interactions with other features.
- ❖ Many of the On/Off features shown in this list and the individually enabled settings shown here may also be managed via the **Basic Features Dashboard Card** and through the user's device using phone codes, AKA: Star Codes, when set to *Enabled*. (ex: *77).



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

Access the Settings Page

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

View / Edit User Feature Settings

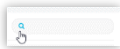
In the **Settings** page: Click on the arrow ▶ under the [View/Edit](#) column next to a feature to open its [Edit](#) view and modify the feature setup.

Trunking

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

Location	Location ID	Trunk Group ID	Pilot DID	Enterprise CP	Location CP	Services Numbers	Edit
location 2	3100000028-02	2057219606TRUNK	2057219606	7	2	1	
Sip Trunk Location	3100000028-06	2057219623TRUNK	2057219623	7	3	1	
Hlaine's House of Chicken Soup	3100000028-03	2057300916TRUNK	2057300916	7	1	0	
Sip Trunk Location	3100000028-06	2057300979TRUNK	2057300979	7	1	0	

Section Search



Locate data found within the table below.

Column Links

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

Edit



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

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

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

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

Call Forward Always

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

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

Call Forward Always

Call Forwarding Always Action: None

Forward to Phone Number/SIP-URI:
2058675309

Reroute to Trunk Group: None

Save

Unreachable Destination

Manage the behavior for calls when the dialed destination is unreachable. The default action is **None**.

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

Unreachable Destination

Unreachable Destination Timeout: 6 Seconds

Unreachable Destination Action: None

Forward to Phone Number/SIP-URI:
2058675309

Reroute to Trunk Group: None

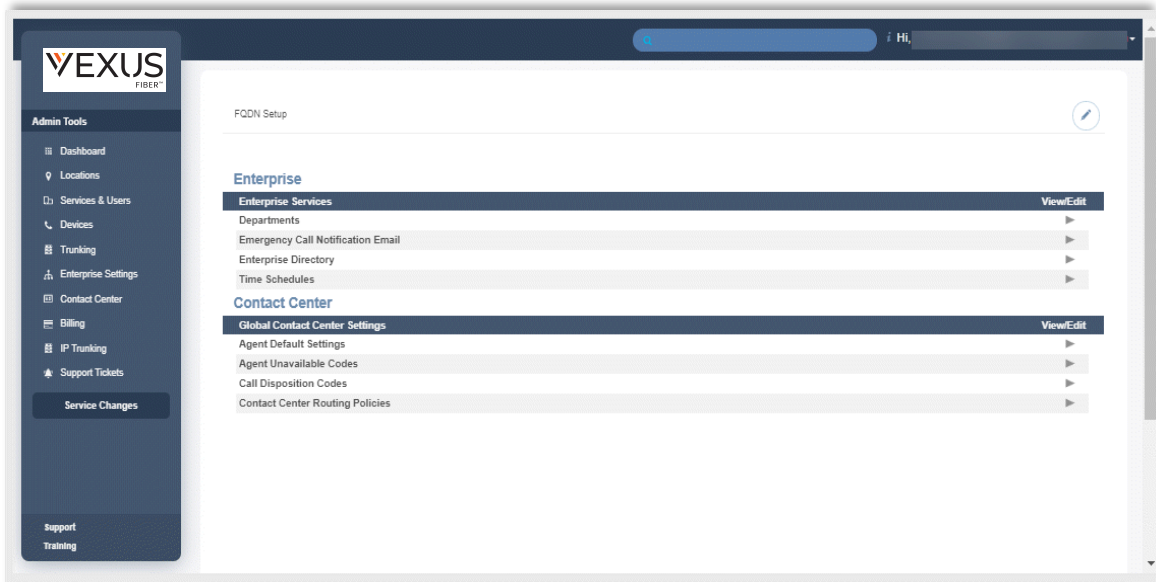
Save

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

Enterprise Settings

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

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



Enterprise FQDN Setup

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

Add a Fully Qualified Domain Name (FQDN)

In the Enterprise Settings view:

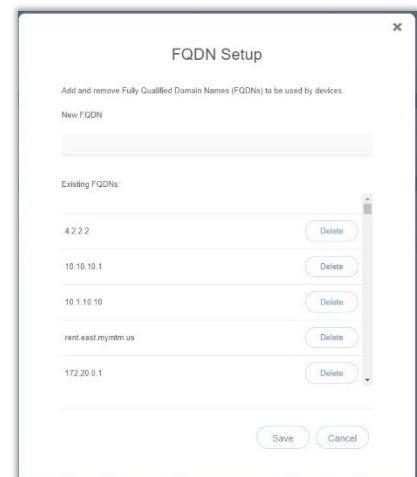
1. Click the **Edit** icon adjacent to FQDN Setup.
2. Enter a new Fully Qualified Domain Name in the text field.
3. Click **Save** when finished to update the list of available FQDNs and close the dialog.

Delete a Fully Qualified Domain Name (FQDN)

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

In the Enterprise Settings view:

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



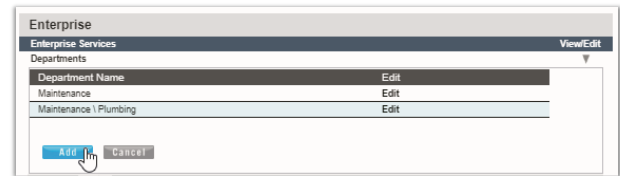
Enterprise Departments

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

Add a Department

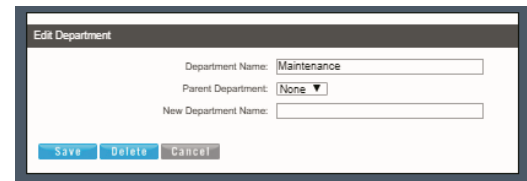
In the **Departments** edit view:

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



Edit a Department

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



Delete a Department

Caution: This action is immediate and cannot be undone

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

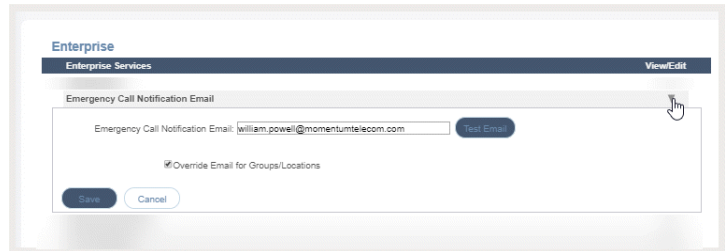
Enterprise Emergency Call Notification Email

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

See also: [Locations & Groups - Emergency Call Notification Email](#)

In the *Enterprise Settings* view:

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



2. **Emergency Call Notification Email:** Enter one (1) email address that will receive emergency call notification messages when a user dials 911 from within the Enterprise system. This address is the default email address on file for receipt of these messages for the Enterprise.
 - ❖ **Optional: Override Email for Groups/Locations:** Click to place a check in the box to allow Location/Group Administrators to override the Enterprise level email address and define alternate email addresses that will receive the notifications when calls to 911 are made from system phones assigned to the location. You may also click to remove the check mark and disable the override option in Locations. This also reverts all locations to use the Enterprise default email for 911 Call Notifications. **Note:** This check box disables the use of the Enterprise level email address. If all emails should go to the email entered here at the Enterprise level, do not click to enable this functionality.
3. Click the **Save** button when finished to submit the changes, update the system (and auto-populate the Locations email addresses) and close the Edit view. Synchronization is generally quick, but it can take up to 15 minutes to fully update all necessary areas within the system to display the email address defined here.

Optional: Test Email: Return to the **Emergency Call Notification Email Edit** view and click on the **Test Email** button to send a test email from the system to the address listed in the **Emergency Call Notification Email** field. A validation email is sent by the system to the address on file. No further action is needed or required when the email is received.

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

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

Enterprise Directory

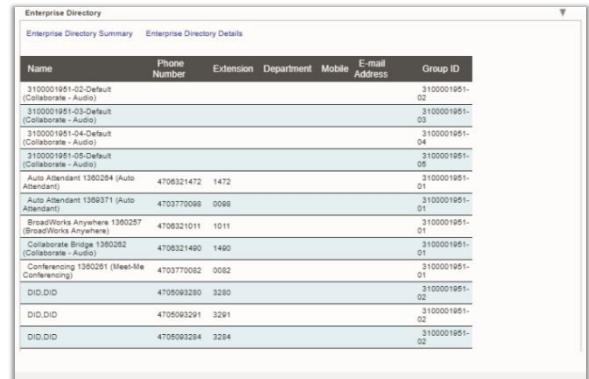
The **Enterprise Directory** feature offers an online listing of all phone service information within the Enterprise directory for the account.

Print Enterprise Directory Summary

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

Print Enterprise Directory Details

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



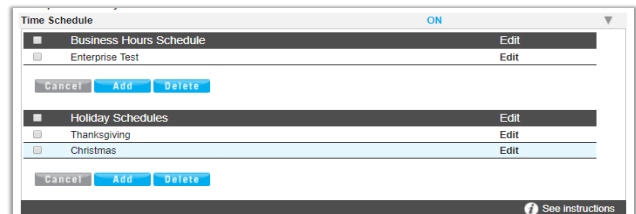
Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID
3100001951-02-Default (Collaborate - Audio)						3100001951-02
3100001951-03-Default (Collaborate - Audio)						3100001951-03
3100001951-04-Default (Collaborate - Audio)						3100001951-04
3100001951-05-Default (Collaborate - Audio)						3100001951-05
Auto Attendant 1360284 (Auto Attendant)	4706321472	1472				3100001951-01
Auto Attendant 1360371 (Auto Attendant)	4703770068	0068				3100001951-01
BroadWorks Anywhere 1360257 (BroadWorks Anywhere)	4706321011	1011				3100001951-01
Collaborate Bridge 1360282 (Collaborate - Audio)	4706321490	1490				3100001951-01
Conferencing 1360261 (Meet-Me Conferencing)	4703770062	0062				3100001951-01
DID.DID	4705093280	3280				3100001951-02
DID.DID	4705093291	3291				3100001951-02
DID.DID	4705093284	3284				3100001951-02

Enterprise Time Schedules

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

Add a Schedule

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



The screenshot shows the 'Time Schedule' configuration window. It is currently set to 'ON'. There are two main sections: 'Business Hours Schedule' and 'Holiday Schedules'. Under 'Business Hours Schedule', there is a checked checkbox for 'Enterprise Test' and an 'Edit' button. Below this are 'Cancel', 'Add', and 'Delete' buttons. Under 'Holiday Schedules', there are checked checkboxes for 'Thanksgiving' and 'Christmas', each with an 'Edit' button. At the bottom, there are 'Cancel', 'Add', and 'Delete' buttons, and a 'See Instructions' link.

Delete a Schedule

Caution: This action is immediate and cannot be undone.

1. Click within the check box adjacent to a Schedule to select it.
2. Click on the **Delete** button within that section to immediately delete the Schedule and any events attached to it. This will affect any features that have selected this Schedule to trigger call behaviors (for example: Call Forwarding, Call Forwarding Selective, etc.)

Add an Event

1. Click to place a check mark next to the preferred option (**Business Hours** or **Holiday Schedule**)
2. Click **Add Event** to review and define the following options, as needed for a specific event type:
 - ❖ **Event Name:** Type a short title for review in lists.
 - ❖ **Start Date:** Select the date the event begins.
 - ❖ Select the **All Day Event** check box , OR define the **Start Time**, **End Time**, and/or **End Date**
 - ❖ **Recur:** (Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week).
 - ❖ **Recur every x** (Months or Year and/or the Numerical day of the month).
 - ❖ **End:** Never, After (x # of occurrences), or Date (set the end date).
3. Click on the **Save** button when finished to submit the data and close the pop-up dialog.

Edit an Event

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

Delete an Event

Caution: This action is immediate and cannot be undone.

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

Enterprise Agent Default Settings

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

Manage Enterprise Agent Default Settings

1. Select and define the following settings for Agents assigned to the Contact Center:
 - ❖ **Use Guard Time Settings:** Click within the radial button to enable either Default or Enterprise.
 - ❖ Click within the box to **Enable guard time** and select the amount of time in *Seconds* using the drop-down menu.
 - ❖ **Use Agent Unavailable Settings:** Click within the radial button to enable either Default or Enterprise.
 - ❖ Click within the box to enable Force Agent to unavailable on do not disturb activation.
 - ❖ Click within the box to Force Agent to unavailable on personal calls.
 - ❖ Click within the box to Force Agent to unavailable after x consecutive bounces and specify the number of bounces using the drop-down menu.
2. Click the [Save](#) button when settings are defined to submit the changes and close the dialog.

Enterprise Agent Unavailable Codes

Enable, add, and manage activation and usage of the codes that agents will use when unavailable for Contact Center calls. Click on the arrow ► under the View/Edit column next to this feature to open its *Edit* view.

Enable Agent Unavailable Codes

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

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

Add Agent Unavailable Codes

- Click on the **Add** button to begin adding a new code.
- Click within the **Active** check box to *enable* the new code for usage.
- Type the new **Code** in the field provided.
- Type a **Description** / title that will be displayed for review in lists.
- Click the **Save** button and close the dialog.
- Optional:* Review the list of codes and click within the boxes adjacent to each to Activate or Deactivate individual items.
- Click the **Save** button to submit the changes and close the *Agent Unavailable Codes* edit settings dialog.

Edit Agent Unavailable Codes

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

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

Enterprise Call Disposition Codes

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

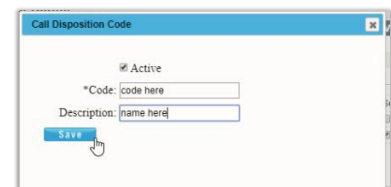


Add Call Disposition Codes

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

Edit Call Disposition Codes

1. In the Call Disposition Codes *Edit* view, you may make the following changes:
 - ❖ **Activate/Deactivate Call Disposition Codes:** Click within the **Active** check box to Enable or Disable the selected code.
 - ❖ **Edit Call Disposition Code information:** Click on the **Edit** option next to an item in the list to review and modify the **Code** and **Description** information.
2. Click the **Save** button(s) to submit all changes and close dialogs.



Delete Call Disposition Codes

Caution: This action is immediate and cannot be undone.

1. Click within the check box in the **Select** column next to a listed code.
Example: Agent Unavailable Code.
2. Click on the **Delete** button to remove the code from the system.
3. Click the **Save** button(s) to submit all changes and close dialogs.

Enterprise Contact Center Routing Policies

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

Click on the arrow ► under the View/Edit column next to a feature to open its *Edit* view.



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

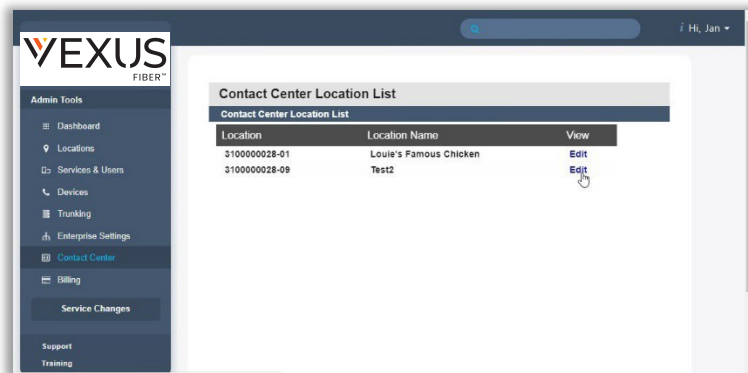
Contact Center Name	Priority
Call Center Renamed2	1

Manage Enterprise Contact Center Routing Policies

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

*Contact Center

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



Edit Contact Center Queues

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

Edit Contact Center Basics

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

Edit Contact Center Group Policy Settings

Group Policy section:

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

Edit Contact Center Bandwidth and QoS Settings

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

Edit Contact Center Settings

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

Edit Contact Center Reporting

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

Edit Contact Center Agent Settings

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

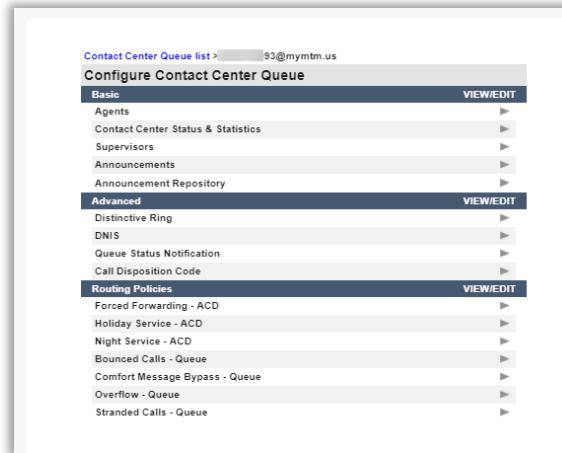
Reset Contact Center Queue Password

Manage the password for the Contact Center.

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

Configure Contact Center Queue Features

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



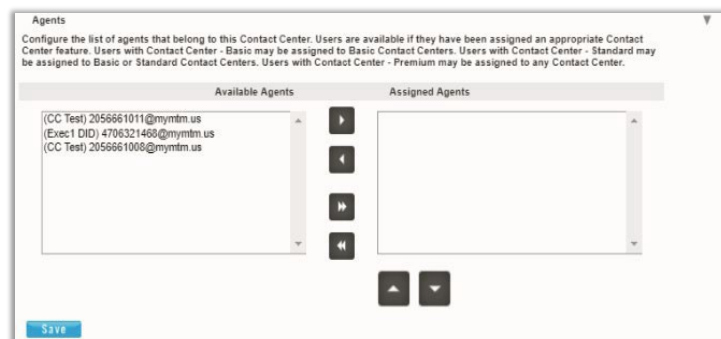
1. Click on the [Configure](#) link for a Contact Center listing to open the [Configure Contact Center Queue](#) dialog and review the features that may be administered.
2. Click on the arrow ▶ under the View/Edit column next to a feature to open its [Edit](#) view.

Contact Center Agents

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

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

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



Contact Center Status & Statistics

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

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

Contact Center Supervisors

Manage the Supervisors and Agent assignments for this contact center.

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

Contact Center Announcements

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

Entrance Message

- Select and define the following Entrance announcement options, as needed:
 - ❖ Play Entrance Message
 - ❖ Entrance Message is mandatory when played.
 - ❖ **Audio:** Select desired option:
 - Default** – play the system message.
 - URL** - enter the URL(s) in order of play.
 - Custom** - select File(s) in order of play.
- Click the **Save** button when finished to submit the data and close the dialog.

Estimated Wait Message

- Select the **Estimated Wait Message** tab and define the following setting options:
 - ❖ Enable estimate message for queued calls: Click to place a check in the box to enable Estimate Wait Messages.
 - ❖ Announce Queue Position.
 - Play message for callers in queue positions: X (or lower): Enter the highest number in queue that will hear the queue position announcement.
 - ❖ Play high volume message: Click to place a check in the box to enable.
 - ❖ Announce Wait time: Click to enable/ disable
 - ❖ Play message to callers with a wait time of X (minutes or lower): Enter the highest number of minutes a caller will be waiting when the wait time message will be allowed to play.
 - ❖ Play high volume message: Click to place a check in the box to enable.
 - ❖ Default handling time: X (minutes per call): Enter the default handling time per call.
- Click the **Save** button when finished to submit the data and close the dialog.

The screenshot shows the 'Estimated Wait Message' configuration dialog. It includes the following settings:

- Enable estimate message for queued calls
- Announce Queue Position
 - * Play message for callers in queue positions: (or lower)
 - Play high volume message
- Announce wait time
 - * Play message for callers with a wait time of: (minutes or lower)
 - Play high volume message
 - * Default handling time: (minutes per call)

A 'Save' button is located at the bottom of the dialog.

Comfort Message

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

The screenshot shows the 'Comfort Message' configuration dialog. It includes the following settings:

- Play Comfort Message
- Time between Messages: seconds. **Note: Can't be less than 10 seconds.**
- Audio:
 - Default
 - URL
 - 1:
 - 2:
 - 3:
 - 4:
 - Custom
 - File 1:
 - File 2:
 - File 3:
 - File 4:

A 'Save' button is located at the bottom of the dialog.

Music On Hold

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

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

The screenshot shows the 'Announcements' configuration window with the 'Music On Hold Message' tab selected. The 'Enable music or video on hold for queued calls' checkbox is checked. Under the 'Audio' section, the 'URL' radio button is selected. There are four input fields for URLs labeled 1, 2, 3, and 4. Below that, the 'Custom' radio button is selected, and there are four dropdown menus for 'File 1', 'File 2', 'File 3', and 'File 4', all currently set to 'None'. The 'External Source' radio button is unselected. A 'Save' button is at the bottom.

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

Call Whisper Message

1. Select the **Call Whisper Message** tab and define the following setting options:

- ❖ Play Call Whisper Message: Click to enable Call Whisper Messages.
- ❖ Audio
 - Default: Click to enable the use of system messages.
 - URL: Select to enable and enter specific URLs for audio files which will be played to agents in the order shown (1, 2, 3, 4)
 - Custom: Select to enable and choose from the files in the Announcement repository

The screenshot shows the 'Announcements' configuration window with the 'Call Whisper Message' tab selected. The 'Play Call Whisper Message' checkbox is checked. Under the 'Audio' section, the 'URL' radio button is selected. There are four input fields for URLs labeled 1, 2, 3, and 4. Below that, the 'Custom' radio button is selected, and there are four dropdown menus for 'File 1', 'File 2', 'File 3', and 'File 4', all currently set to 'None'. The 'External Source' radio button is unselected. A 'Save' button is at the bottom.

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

Contact Center Announcement Repository

Manage the announcements and greeting files used by this Contact Center. As with the Announcement Repositories for any Locations, Groups or Departments, the file requirements and current usage amounts for the Contact Center's announcement files are displayed to the

Admin, and basic instructions for uploads and management are provided via the [See instructions](#) See Instructions link. See: [Announcement Repository](#)

Contact Center Distinctive Ring

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

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

The screenshot shows the 'Distinctive Ring' configuration window. The 'Enable distinctive ringing for Contact Center calls' checkbox is checked. Below it, the 'Ring Pattern' dropdown menu is set to 'Normal'. A 'Save' button is at the bottom.

Contact Center Bounced Calls – Queue

Configure the Contact Center routing policy for unanswered calls.

1. Enable the following options, as needed:
 - ❖ Bounce Calls after x Rings: Enter the number of rings if enabled.
 - ❖ Bounce Calls if agent becomes unavailable while routing the call.
 - ❖ Alert Agent if call is on hold for longer than x seconds. Enter 30+ seconds if enabled.
 - ❖ Bounce Calls after being on hold by agent for longer than x seconds. Enter an amount of time in seconds.

2. Click the [Save](#) button when finished to submit the data and close the dialog.

Contact Center Overflow – Queue

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

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

2. Click [Save](#) when finished to submit the data and close the dialog.

Contact Center Stranded Calls – Queue

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

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

Contact Center Distinctive Ring

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

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

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

Contact Center Queue Status Notification

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

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

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

Contact Center DNIS

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

See also: [Contact Center Announcements](#)

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

DNIS
Configure the Contact Center DNIS to distribute calls to agents.

DNIS Display settings:

- Display DNIS Number to agent when presenting call instead of calling number
- Display DNIS name to agent when presenting call instead of calling name

DNIS Priority settings:

- Automatically promotes calls with Priority 1 to Priority 0 after waiting Seconds
- Automatically promotes calls with Priority 2 to Priority 1 after waiting Seconds
- Automatically promotes calls with Priority 3 to Priority 2 after waiting Seconds

Name	Phone Number	Extension	Priority	Edit	Select
Call Center 2430485(Primary)	2059187200	7200	0 - Highest	Edit	<input type="checkbox"/>

Save Add Delete

Manage DNIS Display Settings

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

Manage DNIS Priority Settings

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

Add DNIS

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

1. Click on the [Add](#) button to begin creating a new DNIS listing.

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

Configure DNIS

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

DNIS Entrance Message

1. Select and define the following Entrance announcement options, as needed:
 - ❖ Play Entrance Message: Click within the check box to enable or disable .
 - ❖ Entrance Message is mandatory when played: Click within the check box to enable or disable .
 - ❖ Audio: Select and define the desired option(s):
 - Default – Select if you wish to use the system's default message.
 - URL - Enter the URL(s) in the fields – these define the order of play(1,2,3,4)
 - Custom - Select the custom file(s) to be played in the order shown (1,2,3,4).
2. Click the [Save](#) button when finished to submit the data and close the dialog or continue on to define additional settings in the other tabs where their use is enabled or available – as needed.

DNIS Estimated Wait Message

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

- ❖ **Announce Queue Position:** Click within the radial button to enable and define:

- Play message for callers in queue positions: X (or lower): Enter the highest number in queue that will hear the queue position announcement.

- Play high volume message: Optional. Click to place a check in the box to enable.
- ❖ **Announce Wait time:** Click to enable/ disable and define:
 - Play message to callers with a wait time of X (minutes or lower): Enter the highest number of minutes a caller will be waiting when the wait time message will be allowed to play.
- ❖ **Play high volume message:** Click to place a check in the box to enable and define:
 - Default handling time: X (minutes per call): Enter the default handling time per call.

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

DNIS Comfort Message

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

- **Default:** Click to enable the use of system messages.
 - **URL:** Select to enter specific URLs for audio files which will be played to callers in the order shown (1, 2, 3, 4)
 - **Custom:** Select to enable and choose from the files in the Announcement repository which will be played to callers in the order shown (1, 2, 3, 4)

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

DNIS Music On Hold Message

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

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

DNIS Call Whisper Message

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

Edit DNIS

While working in Contact Center DNIS settings view:

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

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

Delete DNIS

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

While working in Contact Center DNIS settings view:

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

Contact Center Call Disposition Codes

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

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

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

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

Call Disposition Codes can be entered at the Contact Center queue level and at the Enterprise level. See also: [Enterprise Call Disposition Codes](#)

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

Call Disposition Code

Add or Modify Call Disposition Codes. Disposition Codes are attributes applied to a call to identify marketing promotions or other topics pertaining to a call.

Note: Add or modify call disposition codes are attributes applied to a call to identify marketing promotions or other topics pertaining to a call.

Enable call disposition codes

Use group codes in addition to Contact Center codes

Force use of call disposition codes with default codes None

Active	Code	Description	Level	Edit
<input checked="" type="checkbox"/>	new one	testing	Enterprise	Edit

Manage Call Disposition Code Usage

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

Add a Call Disposition Code

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

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

The screenshot shows a dialog box titled "Call Disposition Code". It has a close button (X) in the top right corner. Inside the dialog, there is a checkbox labeled "Active" which is checked. Below it is a text input field labeled "*Code:". Below that is another text input field labeled "Description:". At the bottom of the dialog is a "Save" button.

Activate a Call Disposition Code

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

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

Edit a Call Disposition Code

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

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

Delete a Call Disposition Code

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

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

Contact Center Routing Policies

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

Queued calls are routed to an available agent when he/she is no longer on an active call. Each call queue is assigned a lead number, which is a telephone number outside callers can dial to reach the agents assigned to the call queue. Call Centers are also assigned an internal extension, which can be dialed internally to reach the agents assigned to the call queue.

The following sections offer examples of the types of routing policies that may be managed.

Forced Forwarding – ACD

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

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

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

- Select and/or define the following setting options as needed for **Forced Forwarding – ACD** usage:
 - ❖ **Forced Forwarding On | Off:** Click within the appropriate radio button to turn on or off.
 - ❖ **Call Forwards to phone number/SIP URI:** Enter the phone number or SIP-URI in the field provided.
 - ❖ **Allow feature access codes to configure forced forwarding:** Check this box if you would like the Call Center Supervisor to use their phone to activate (***51**) and deactivate Redirect (***52**) through the use of a star code / feature access code.
 - ❖ **Play announcement before forwarding:** Click to enable and complete the following setting options as needed for the audio to be played...
 - ❖ **Audio:**
 - **Default** - Click to set as the default system message.
 - **URL** - Click to use specific files and enter up to 4 URLs in order of play.
 - **Custom:** Click to use custom files that have been entered into the system and select up to 4 in the order of play from the drop-down selection tools.
- Click **Save** when finished to update the system with the new information.

Forced Forwarding - ACD

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

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

Forced Forwarding: On Off

Call Forwards to phone number/SIP-URI:

Allow features access codes to configure forced forwarding
 Play announcement before forwarding

Audio:

Default
 URL
 Custom

File1:
 File2:
 File3:
 File4:

Holiday Service – ACD

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

1. Select and define the following:

Action:

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

Audio:

If URL was selected above, choose from the following and define as necessary:

- URL: Click to use specific files and enter up to 4 URLs in order of play.
- Custom: Click to use the custom announcement files that have been entered into the Announcement Repository and select up to 4 in the order of play via the drop-down selection tools.

2. Click the [Save](#) button when all changes are complete to update the system and close the dialog.

Night Service – ACD

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

1. Select and define the following setting options for Night Service actions, as needed:

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

2. Click **Save** when finished to update the system with the changes for Night Service - ACD.

Bounced Calls – Queue

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

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

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

2. Click **Save** when finished to update the system with the changes made for Bounced Calls – Queue.

Comfort Message Bypass – Queue

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

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

- ❖ **Comfort Message Bypass** On | Off (default): Click within the On radio button to enable this service.
- ❖ **Bypass Comfort message when estimated wait time is less than ____ seconds:** If the wait time is less than the amount entered here, the Bypass Comfort Message will be used. Enter the desired wait time in seconds.
- ❖ **Play announcement after ringing for ____ Seconds:** Click to Enable and set the number of seconds to allow ringing before the alternate message will be presented to the caller, then set the message **Audio** source below.

- **Default:** Click to use “Please hold while we transfer you to an agent.”
- **URL:** Click to select the use of URLs and enter up to 4 URLs in the order you wish them to play (1, 2, 3, 4.).
- **Custom:** Click to select and use the selection tools to choose up to 4 files from the Contact Center’s Announcement Repository in the order they will play (1, 2, 3, 4).

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

Overflow – Queue

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

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

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

Action:

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

Audio:

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

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

Stranded Calls – Queue

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

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

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

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

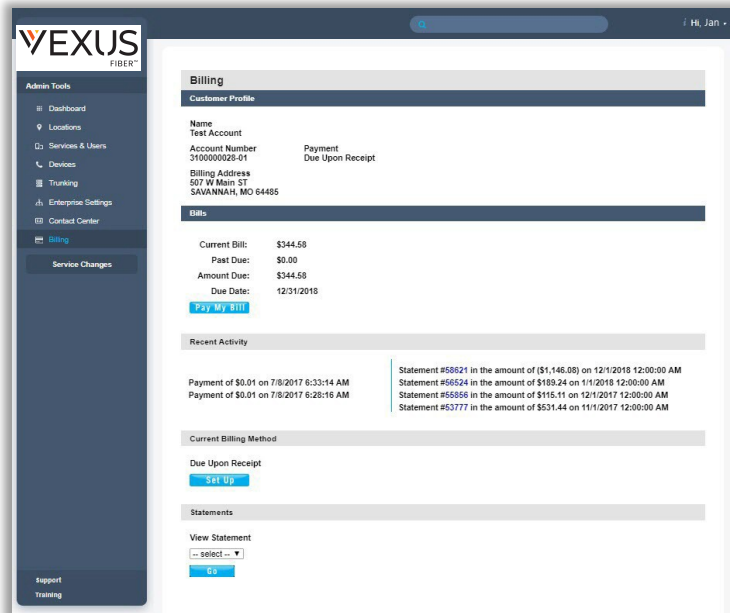
- ❖ **Leave in Queue:** (default) Click to select this action option. Calls will simply remain in the queue.
- ❖ **Perform busy treatment:** Click to select this action option, and calls will be removed from the queue and receive a fast busy tone.
- ❖ **Transfer to phone number / SIP-URI _:** Click to select this action option and enter the destination information in the data-entry field. Calls stranded in queue are removed from the queue and transferred to the configured destination.
- ❖ **Night Service:** Click to use this action option. Calls will be handled according to the [Night Service](#) configuration. Note: If the Night Service action is set to None, then the Stranded Calls policy will perform similarly, and calls remain in the queue.
- ❖ **Play ringing until caller hangs up:** Click to select. Calls are removed from the queue and provided with ringing until the caller disconnects.
- ❖ **Play announcement until caller hangs up:** Click to select and then choose/define the audio selection below. The calls will be removed from the queue and the message selection(s) will be played on a loop until the caller disconnects/ends the call.
- ❖ **Audio:**
 - **Default:** Click to select and use the default system message - “Your call is very important to us, but no agents are available.”
 - **URL:** Click to select the use of URLs and enter up to 4 URLs in the order you wish them to play (1, 2, 3, 4.).
 - **Custom:** Click to select and use the drop-down tools to choose up to 4 files from the Contact Center’s Announcement Repository in the order they will play (1, 2, 3, 4).

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

*Billing

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

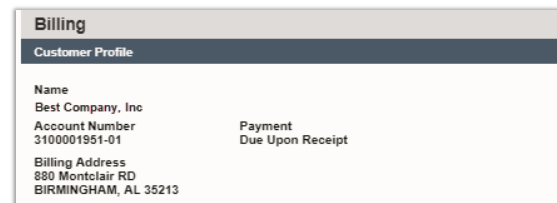
The Billing page provides tools for reviewing and managing the monthly billing and payments for the Enterprise account or Locations on the Enterprise Account (where enabled and authorized for use by the organization).



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

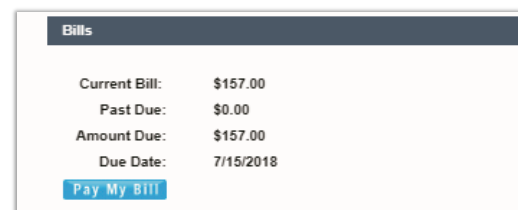
View Customer Profile

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



View Bills

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



View Recent Activity

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



View Current Billing Method

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



Pay My Bill

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

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

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

Bills

Pay by credit/debit card

[Setup a recurring credit card payment>](#)

[Make a one time credit/debit card payment>](#)

[Setup a recurring bank draft>](#)

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

2. Click **Save** or **Submit** to 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.

Pay By Credit/Debit Card

Please fill in the following information to make a payment. Eligible debit cards will be transacted through the Electronic Funds Transfer network. Please note that Momentum can only process debit cards utilizing the STAR and PULSE networks. If your debit card is not supported either of these networks (see logos on the back of your card for applicable networks), you will not be able to successfully complete a debit card transaction. However, you may utilize your card as credit card, provided there is a Visa, Mastercard, or American Express logo on the front of the card.

Account Information

Account Name: 3100001951-01
Amount Due: 157.00
Name on Card:
Card Type:
Card Number: (No dashes)
Expiration:
Security Code:

Payment Schedule

- Recurring Payment

Please be advised when you set up a recurring payment method any past due balance as well as current charges will be charged on your first scheduled payment date.

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.

Account Information

Account Name: (As it appears on your checks)
Account Type:
Routing Number:
Account Number:

For

 Routing Number Check Number Account Number

 Routing Number Account Number Check Number

Payment Schedule

- Recurring Payment (Funds will be drafted no earlier than three days before your invoice's due date)

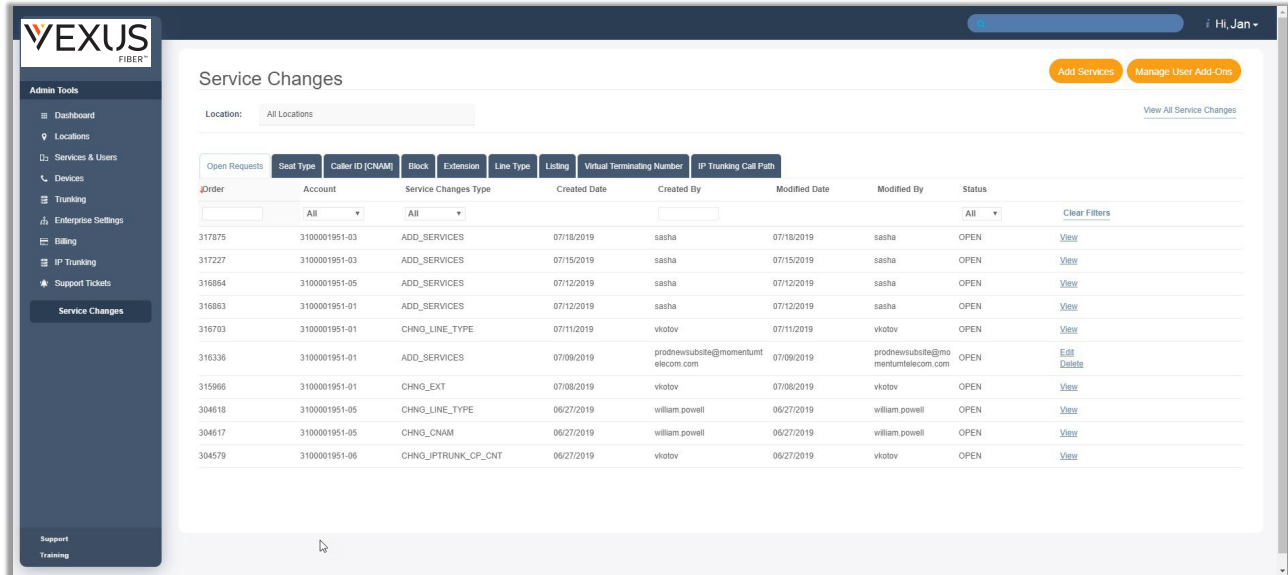
Please be advised when you set up a recurring payment method any past due balance as well as current charges will be charged on your first scheduled payment date.

I have read and agree to the [Terms and Conditions](#)

*Service Changes

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

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



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

	<p>Select the Location to be managed/reviewed from the drop-down selection tool above the tabs and then choose a tab or action button to begin performing tasks.</p>
	<p>Opens the Add Service view to allow selection and configuration of new service requests/orders.</p>
	<p>Opens the Manage User Add-ons view of the current Add-on assignments, sortable by location and Un-Assign Add-ons to allow reassignment/Change.</p>
	<p>Opens the All Service Changes view to display a sortable list of all service change requests that have been entered and their status (Open, Submitted, Discarded, Processing). Context sensitive tools are provided to View, Edit, Delete and/or Terminate, based on the current status of the order.</p>

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



Open Requests

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

Order	Account	MACD Type	Customer Name	Created Date	Created By	Modified Date	Modified By	Status	Clear filters
282851	3100000028-01	ADD_SERVICES	Test Account	03/01/2019	Cloud Services Portal	03/01/2019	Cloud Services Portal	OPEN	Edit Close
282830	3100000028-03	CHNG_LISTING	Test Account	02/28/2019	Cloud Services Portal	02/28/2019	Cloud Services Portal	PROCESSING	View Terminate
282787	3100000028-02	CHNG_LISTING	Test Account	02/28/2019	Cloud Services Portal	02/28/2019	Cloud Services Portal	PROCESSING	View Terminate
282760	3100000028-01	ADD_SERVICES	Test Account	02/28/2019	Cloud Services Portal	02/28/2019	Cloud Services Portal	OPEN	Edit Close
282848	3100000028-01	ADD_SERVICES	Test Account	02/28/2019	Cloud Services Portal	02/28/2019	Cloud Services Portal	OPEN	Edit
282131	3100000028-01	ADD_SERVICES	Test Account	02/27/2019	Cloud Services Portal	02/27/2019	Cloud Services Portal	OPEN	Edit
282114	3100000028-06	ADD_SERVICES	Test Account	02/26/2019	Cloud Services Portal	02/26/2019	Cloud Services Portal	OPEN	Edit
281982	3100000028-01	CHNG_LINE_TYPE	Test Account	02/26/2019	Cloud Services Portal	02/26/2019	Cloud Services Portal	PROCESSING	View
281909	3100000028-01	CHNG_LISTING	Test Account	02/26/2019	Cloud Services Portal	02/26/2019	Cloud Services Portal	PROCESSING	View
281980	3100000028-05	ADD_SERVICES	Test Account	02/26/2019	sdokor	02/26/2019	sdokor	OPEN	Edit
281909	3100000028-01	CHNG_LISTING	Test Account	02/25/2019	gopi.yelamrao	02/25/2019	gopi.yelamrao	OPEN	View
281979	3100000028-01	ADD_SERVICES	Test Account	02/25/2019	MSP Superadmin	02/25/2019	MSP Superadmin	OPEN	Edit
281940	3100000028-01	ADD_SERVICES	Test Account	02/25/2019	MSP Superadmin	02/25/2019	MSP Superadmin	OPEN	Edit
281935	3100000028-01	ADD_SERVICES	Test Account	02/25/2019	MSP Superadmin	02/25/2019	MSP Superadmin	OPEN	Edit
281934	3100000028-01	ADD_SERVICES	Test Account	02/25/2019	MSP Superadmin	02/25/2019	MSP Superadmin	OPEN	Edit
281927	3100000028-01	ADD_SERVICES	Test Account	02/25/2019	MSP Superadmin	02/25/2019	MSP Superadmin	OPEN	Edit
278478	3100000028-01	ASSIGN_USER_ADDON	Test Account	02/07/2019	matt.warren	02/07/2019	matt.warren	OPEN	View

The most recent Services Change order is displayed at the top. This view may be filtered and sorted using the **Location** selection tool, table **Column Headers**, and the **Order**, **Account**, **MACD Type**, **Created By** and **Status** filter tools within the table.

View Open Requests by Location

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

Sort Open Requests

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

Filter Open Requests

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

Order Number

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

Account

Account

Select

Select

3100000028-01

3100000028-03

3100000028-02

3100000028-06

3100000028-05

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

MACD Type

MACD Type

Select

Select

ADD_SERVICES

CHNG_LISTING

CHNG_LINE_TYPE

ASSIGN_USER_ADDON

Select an available MACD type from the drop-down list to show only the selected type in the table below.

Created By

Created By

ma

matt.warren

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

Status

Status

All

All

OPEN

PROCESSING

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

Clear Filters

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

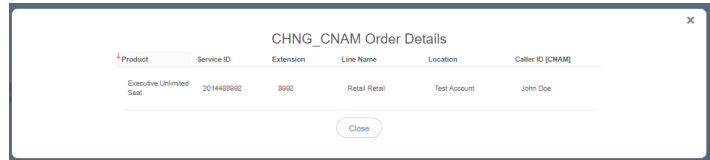
View a Service Change Order

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

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

278478	3100000028-01	ASSIGN_USER_ADDON	Test Account	02/07/2019	matt warren	02/07/2019	matt warren	OPEN	View
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2. Click **Close** when finished to exit the dialog and return to the review the list of Service Change requests.



Edit a Service Change Order

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

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

Order	Account	MACD Type	Customer Name	Created Date	Created By	Modified Date	Modified By	Status	
282881	3100000028-01	ADD_SERVICES	Test Account	03/01/2019	Cloud Services Portal	03/01/2019	Cloud Services Portal	OPEN	Edit

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

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

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

Delete a Service Change Order

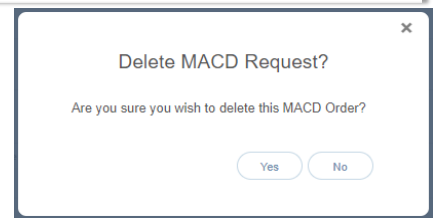
If a service change order can be deleted, the option to do so is provided.

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

282786	3100000028-01	ADD_SERVICES	Test Account	02/28/2019	Cloud Services Portal	02/28/2019	Cloud Services Portal	OPEN	Edit Delete
282545	3100000028-01	ADD_SERVICES	Test Account	02/28/2019	Cloud Services Portal	02/28/2019	Cloud Services Portal	OPEN	Edit

2. Click **Yes** when prompted to confirm the action.

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



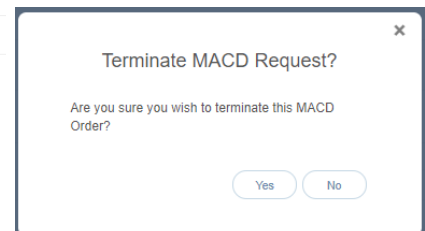
Terminate a Service Change Order

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

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

Cloud Services Portal	PROCESSING	View Terminate
Cloud Services Portal	OPEN	Edit

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



Add Services

Advanced access to create a new service order for a location on the account.

New charges (recurring and/or non-recurring) that can affect billing may be incurred when adding services.

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

Add Services

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

Part Num	Product Description	Monthly	One-Time	
DA215	Toll-Free Number	\$4.70	\$9.45	Add
DX205	Virtual Number	\$1.85	\$9.45	Add
DX214	Call Center DNS Number	\$0.90	\$9.45	Add

Add a Service Change Order

1. Click the **Add Services** button to open the *Add Services* view.
2. Choose a **Location** from the drop-down selection tool.
3. Locate desired items via:
 - a. The *Search* tool above the list.
 - b. Scroll through the list.

Add

The screenshot shows the 'Add Services' form with a search bar and a table of services. A 'Configure' button is highlighted over the table.

Part Num	Product Description	Monthly	One-Time	
90353	Auto-Message Text	\$0.00	\$0.00	Add
FX277	Single In	\$0.00	\$0.00	Add
FX278	Event Call Center Cap	\$0.00	\$0.00	Add

4. Click the **Add** button adjacent to the desired item to select it.

The selected item is displayed at the top of the page to allow for *configuration*.

Most service change types require specific configuration information in order to

submit for processing. The system will assist users and notify when missing information is discovered during the auto-validation process it completes prior to allowing the order to be saved and/or submitted.

Note: At any time, users may stop the add process. Click **Remove** to delete the item from the order and click **Yes** to confirm and re-select something else; or click **Cancel** to discard the order and click **Yes** to confirm.

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

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

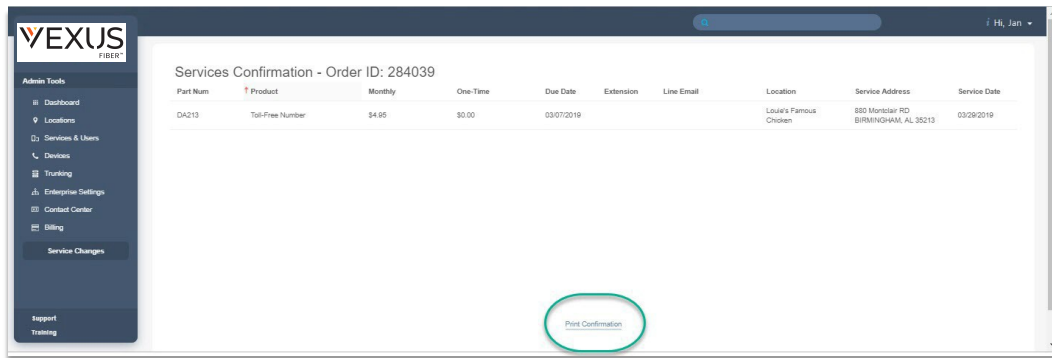
The screenshot shows the 'Add Services' form with a calendar for selecting a service date. The calendar is for March 2019. A 'Service Date' field is visible with a dropdown arrow and a 'Submit Order' button.

Service Date: **Desired Date is mandatory.**

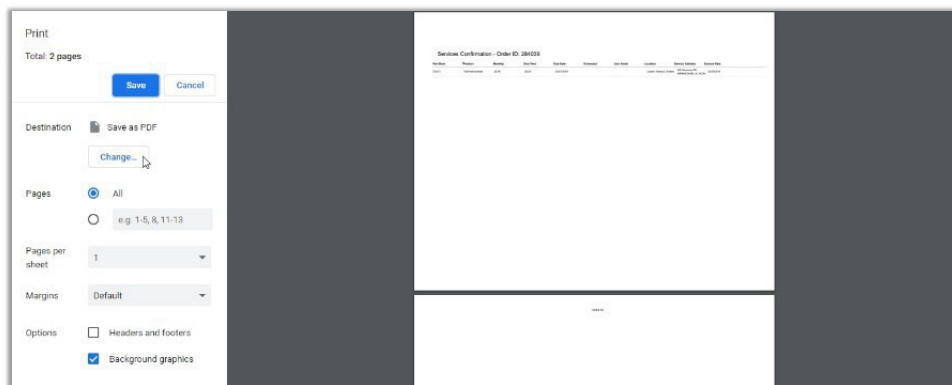
Submit Order Back

Print Service Change Confirmation

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



1. Click on the **Print Confirmation** link (bottom of the page) to open the Print dialog.
2. Accept the default settings (PDF, All pages, to local file...) to print all that is displayed per page, or select from the following print options:
 - **Destination:** Click **Change** to specify the print type and file location on your local system.
 - **Pages:** Specify the number or range of pages to print.
 - **Pages per sheet:** Specify the number of pages to print on each page, as needed.
 - **Margins:** Define new top, bottom and side margins, as needed.
 - **Options:** Click to place checkmarks in the checkboxes for Headers and Footers and Background Graphics to include in the final print copy.
3. Click **Save** when finished to download a copy of the order confirmation.





Manage User Add-Ons

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

Manage User Add-Ons

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

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

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

Assign a User Level Add-On

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

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

The list of available users with compatible services displays.

2. Use one of the following methods to locate the user(s) to be assigned the Add-On:
 - Scroll through the list to locate the appropriate user.
 - Use the Search tool at the top of the list to filter the list by name or telephone number (TN).
3. Click on the **Assign** button next to the desired user to assign the add-on.
4. Repeat for any other users if there are multiple Add-Ons available.
5. Click **Save** when finished to submit the change in User Add-On assignment(s), close the dialog and return to the **Manage Add-Ons** view.

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

Assign

Assign User Add-On

Available: 4 Assigned: 1 Remaining: 3

Search Users by Name or TN

Service ID	Extension	First Name	Last Name	Seat Type	Assign
0007	0		0	Advanced Executive Seat	Assign
0038	0		0	Executive Extension Seat	Assign
00	Paula	Test		Executive Extension Seat	Assign
1030	Alix	Yi		Advanced Executive Seat	Assign
127	Jane	Estimate		Executive Extension Seat	Assign
9074	Patricia	Fullerton		Executive Extension Seat	Assign
211408002	8302	Paula	Test	Executive Unlimited Seat	Assign
250210498	4007	test	enter	Executive Unlimited Seat	Assign
250302190	1000	Test	User2	Advanced (New) Unlimited	Assign
2503031210	9438	Paula	Test	Executive Unlimited Seat	Assign
250602008	2008	Test	User1	Executive Unlimited Seat	Assign
250602008	0508	Kasey	Jameson	Basic Seat	Assign
250603006	8408	Blanca	Blanca	Basic Seat	Assign
250710007	801	J	J	Advanced (New) Unlimited	Assign
250710009	9400	J	J	Advanced (New) Unlimited	Assign
250710007	807	0	0	Basic Seat	Assign
250710004	9004	Test	Test	Executive Unlimited Seat	Assign
250710006	9700	Test	J	Executive Unlimited Seat	Assign
250710004	9704	Paula	Test	Executive Unlimited Seat	Assign
250710003	9003	test	J	Advanced (New) Unlimited	Assign
250710003	9403	test	test	Executive Unlimited Seat	Assign
250710010	8100	test	test	Executive Unlimited Seat	Assign
250802012	2012	test	test	Advanced (New) Unlimited	Assign
3048010003	9000	test	test	Advanced (New) Unlimited	Assign
850010000	0070	Brandon	Yarves	Executive Unlimited Seat	Assign
854200000	9000	test	J	Executive Unlimited Seat	Assign

Save Close

Un-Assign a User Level Add-On

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

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

The list of current Add-On Assignment(s) displays.

2. Click on the **Un-Assign** button next to the desired user to remove the assignment.
3. Repeat for any other users if there are multiple Add-Ons to be unassigned.
4. Click **Save** when finished to submit the change in User Add-On assignment(s), close the dialog, and return to the **Manage Add-Ons** view.

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

Un-Assign

Un-Assign User Add-On

Available: 3 Assigned: 2 Remaining: 1

Search Users by Name or TN

Service ID	Extension	First Name	Last Name	Seat Type	Un-Assign
250602008	0508	Kasey	Jameson	Basic Seat	Un-Assign
2503031210	9438	Paula	Test	Executive Unlimited Seat	Un-Assign

Save Close

View All Service Changes

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

[View All Service Changes](#)

All Service Changes							
Order	Account	Service Changes Type	Created Date	Created By	Modified Date	Modified By	Status
	All ▼	All ▼					All ▼
							Clear Filters
293416	3100000028-01	ADD_SERVICES	04/24/2019	3099347877uy@ykkkkku.com	04/24/2019	3099347877uy@ykkkkku.com	OPEN Edit Delete
291648	3100000028-01	ADD_SERVICES	04/16/2019	matt.warren	04/16/2019	matt.warren	OPEN View
291521	3100000028-13	ADD_SERVICES	04/15/2019	jdewoody	04/15/2019	jdewoody	COMPLETED View
291416	3100000028-01	ADD_SERVICES	04/14/2019	3099347877uy@ykkkkku.com	04/14/2019	3099347877uy@ykkkkku.com	DISCARDED View
291404	3100000028-13	ADD_SERVICES	04/12/2019	jdewoody	04/12/2019	jdewoody	COMPLETED View
290757	3100000028-01	ADD_SERVICES	04/10/2019	3099347877uy@ykkkkku.com	04/10/2019	3099347877uy@ykkkkku.com	COMPLETED View
289914	3100000028-01	ADD_SERVICES	04/05/2019	3099347877uy@ykkkkku.com	04/05/2019	3099347877uy@ykkkkku.com	COMPLETED View
289906	3100000028-01	ADD_SERVICES	04/05/2019	3099347877uy@ykkkkku.com	04/05/2019	3099347877uy@ykkkkku.com	OPEN Edit Delete
289413	3100000028-01	ADD_SERVICES	04/03/2019	3099347877uy@ykkkkku.com	04/03/2019	3099347877uy@ykkkkku.com	COMPLETED View
289346	3100000028-01	ADD_SERVICES	04/03/2019	3099347877uy@ykkkkku.com	04/05/2019	3099347877uy@ykkkkku.com	DISCARDED View

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

Data within the table includes:

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

Admins with appropriate access can perform the following administrative activities in this view:

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

View Service Change Order Details

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

Edit an Active Service Change Order

This action is available when editing is permissible.

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

Note: Each service change type requires specific information for configuration. The system will assist users and notify if any missing information is discovered during the auto-confirmation process it completes prior to allowing the order to be submitted.
3. Locate, select, and configure additional services (as needed).
4. Click [Save](#) when finished.

Delete a Service Change Order

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

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

Seat Type

Change (upgrade or downgrade) seat types for lines in locations on the account. In this tab, Column headers may be used to sort the list alphanumerically by the column contents. A section Search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, and Location. The *Seat Type* column displays the current seat type and allows the user to select another type to order from the drop-down list.

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

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

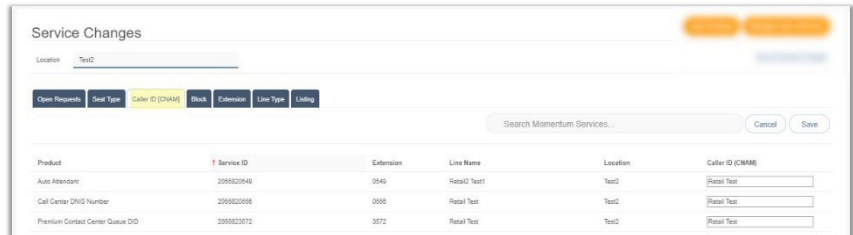
The screenshot shows the 'Service Changes' interface with the 'Seat Type' tab selected. The table below represents the data shown in the interface:

Product	Service ID	Extension	Line Name	Location	Seat Type
Executive (Seat) Local In/Out Included - Metered LD	205855995	5955	Cody Hawthorne	Test	[Executive (Seat) Local In/Out ▼]
Advanced (Seat) Local In/Out Included - Metered LD	2057915384	9394	Cody Hawthorne	Test	[Advanced (Seat) Local In/Out ▼]
Advanced (Seat) Local In/Out Included - Metered LD	2057915481	9481	Cody Hawthorne	Test	[Advanced (Seat) Local In/Out ▼]
Executive (Seat) Local In/Out Included - Metered LD	2057915537	9537	Cody Hawthorne	Test	[Executive (Seat) Local In/Out ▼]
Basic Metered Seat	2058475299	9299	Cody Hawthorne	Test	[Basic Metered Seat ▼]

Caller ID (CNAM)

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

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

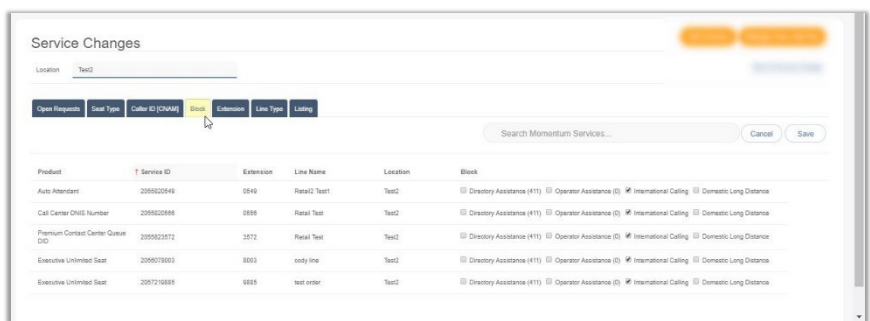


5. Repeat for any additional Caller ID [CNAM] changes to other listings.
6. Click **Save** to submit the changes for processing,
Or to discard the changes, click **Cancel** and choose **Yes** when prompted to confirm the action.

Block

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

1. Click on the **Block** tab to display the section.
2. Select a **Location** at the top of the page to display the assigned lines.
3. Locate the line to be changed. **Block:** Click within a check box to enable/ disable the setting options, as needed.



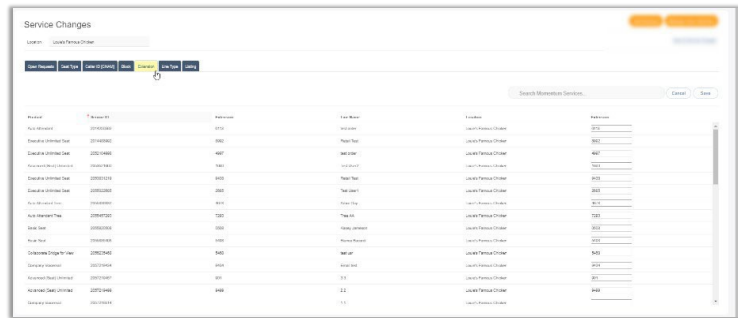
These settings include:

- ❖ **Directory Assistance:** Enable to block calls from the line to directory assistance (USA = 411).
 - ❖ **Operator Assistance:** Enable to block calls from the line to operator assistance.
 - ❖ **International Calling:** Enable to block international calls from the line. (Enabled by default)
 - ❖ **Domestic Long Distance:** Enable to block domestic long-distance calls from the line.
4. Click **Save** to submit the changes for processing.
Or click **Cancel** and confirm when prompted to discard changes.

Extension

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

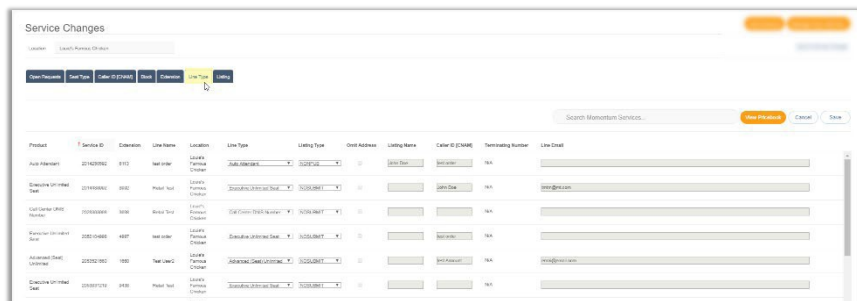
1. Click on the **Extension** tab.
2. Select a **Location** at the top of the page to view the assigned lines in a simple table format.
3. Locate the item to be changed.
4. Type a new extension number in the **Extension** field adjacent to the item in the far-right column.
5. Repeat as needed for other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



Line Type

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

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



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

Product	Service ID	Extension	Line Name	Location	Line Type	Listing Type	Omit Address	Listing Name	Caller ID (NAME)	Terminating Number	Line Email
App Assistant (Seat)	200730090	0000	test user	test	(E)WORKER (UNRECORDED SW)	(LISTED)	IP	User X	User X	N/A	test@domain.com

- ❖ **Line Type:** Select a new Line Type from the available options in the drop-down. The other listing fields also become available for edit.
Note: If there are User Add-Ons assigned, the system notifies the user that they must be Un-assigned prior to a Line Type change.
- ❖ **Listing Type:** Select an option in the drop-down once changes are made to the Line Type. Options include: LISTED, NONLIST, NONPUB and NONSUBMIT (default)
- ❖ **Omit Address:** Available for edit when *Listed* is selected for the *Listing Type*. Click to place a check mark in the check box to omit Address in the listing.
- ❖ **Listing Name:** Type the assigned name to be displayed for the service.
- ❖ **Caller ID [CNAM]:** Type the name or term used for outgoing Caller ID (displayed to receivers).
- ❖ **Terminating Number:** Used with Virtual Number Line Type. Enter the 10-digit number (no spaces or special characters)
- ❖ **Line Email:** Enter the full email address (e.g.; name@email.com).

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

Listing

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

Product	Service ID	Extension	Line Name	Location	Listing Type	Omit Address	Listing Name
Auto attendant	201405062	8113	test order	Louie's Famous Chicken	NONSUBMIT	<input type="checkbox"/>	test Line
Executive Unlimited Seat	201448882	8982	Retail Test	Louie's Famous Chicken	NONSUBMIT	<input type="checkbox"/>	
Call Center CRM Number	202503688	3688	Retail Test	Louie's Famous Chicken	NONSUBMIT	<input type="checkbox"/>	
Executive Unlimited Seat	205210488	4887	test order	Louie's Famous Chicken	NONSUBMIT	<input type="checkbox"/>	

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

- ❖ **Listing Type:** Choose from:

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

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

Virtual Terminating Number

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

Service Changes

Location:

Open Requests | Seat Type | Caller ID (CNAM) | Block | Extension | Line Type | Listing | **Virtual Terminating Number**

Search Momentum Services...

Product	Service ID	Line Name	Location	Terminating Number
Virtual Number	3048070517	88	Louie's Famous Chicken	<input type="text" value="2057219534"/>
Virtual Number	2055060329	33	Louie's Famous Chicken	2057219536

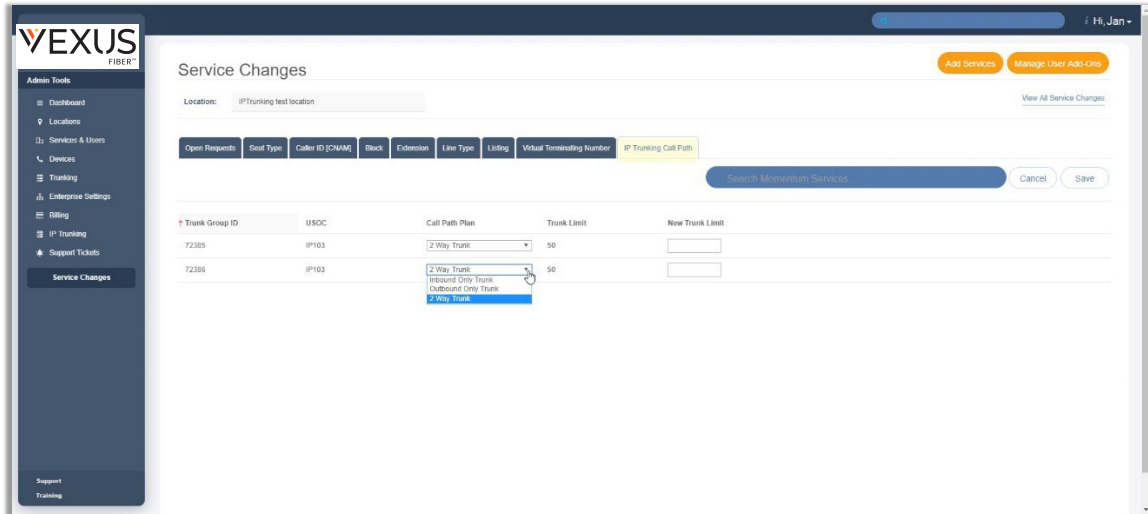
1. Click on the **Virtual Terminating Number** tab in the Service Changes page.
2. Select a **Location** from the drop-down list at the top of the page. *The list for the location displays.*
3. Identify the correct virtual number line within the table. *The Search tool and column headers are available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



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

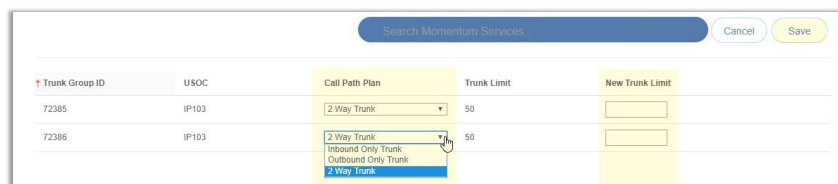
The *History* of this service change activity may be reviewed in both of those pages, as well.

IP Trunking Call Path

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



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



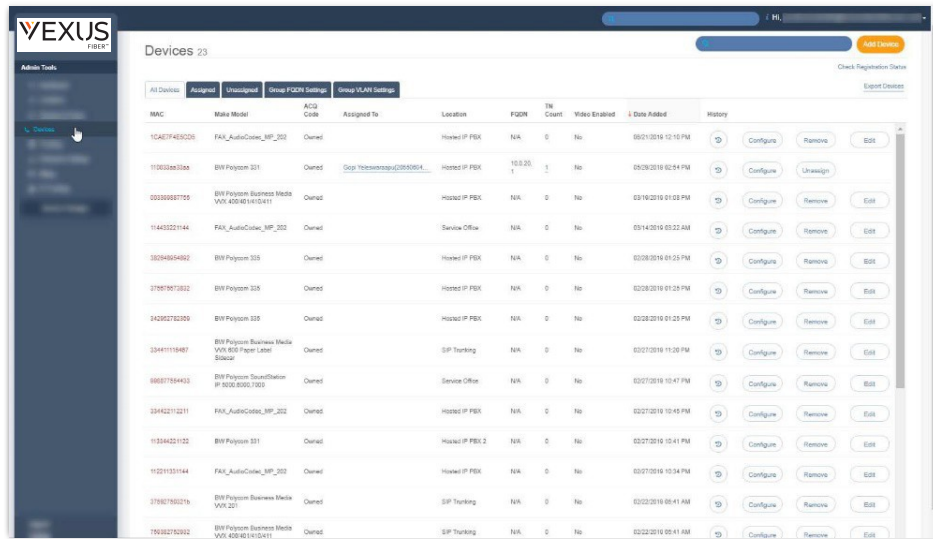
5. Repeat as needed to update any other Trunk Groups listed under the selected Location.
6. Click on the Save button to submit the change request(s).

The information for this change request may be reviewed in the **Open Requests** tab, and within the **View All Service Changes** page. The *History* of this service change activity may be reviewed in both of those pages, as well.

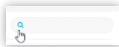
*Devices

Restricted Access. Only Specially trained and authorized Administrators may be granted permission to work with advanced tools

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



Section Search



Locate data found within the table view below.

Add Device



The Add Device button allows an authorized Admin to add new devices to inventory one at a time. Once added, the device(s) may be configured and assigned to users.

Export Devices



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

Tab Views



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

Column Link(s)

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

History



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

Configure



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

Check Registration Status

Poll NEPS / BroadSoft and update registration information.

Unassign



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

Remove



Delete unassigned devices from inventory.

Edit

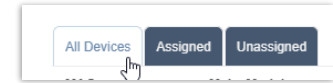


Modify unassigned device inventory data.

View Device Lists

Access to review and manage the account's devices in inventory is provided in the Admin Dashboard via the Devices card and the Quick View card for authorized administrators. The Devices section is also accessible via the menu listing in the Navigation panel on the left. The tabs at the top of the **Devices** page offer access to review the device lists for **All Devices**, **Assigned** and **Unassigned** devices. The default view is **All Devices**.

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



Group VLAN Settings

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

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



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

Set Group VLAN ID

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

Set Group IP Transport Protocol for Devices

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

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

Set Group Encrypted Audio & Signaling for Devices

Enable Encrypted Audio & Signaling? On/Off setting. Click to slide the toggle to ON as needed for usage.

4. **Save** - Click the **Save** button to update the system with any changes.

Group FQDN Settings

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

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



 A screenshot of the "Group FQDN Setup" form. It includes a "Location" dropdown menu set to "Hosted IP PBX", a "Current FQDN" field with the value "192.168.88.1", and an "Available FQDN" field with a dropdown arrow. At the bottom are "Save" and "Cancel" buttons.

Add a Device

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

Add Device

While working in [Devices](#):

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

 A screenshot of the "Add Device Inventory" dialog box. It contains fields for "MAC Address", "Device Type" (with a "-Select-" dropdown), "Location" (with a "-Select-" dropdown), and "Device Notes". At the bottom are three buttons: "Save", "Save & Add Another Device", and "Close".

Export Device Setting/Configuration Information

The [Export Devices](#) link at the top of the [Devices](#) section view allows users to download the current list of devices along with the information shown within the Devices list to a .csv spreadsheet format (comma-delimited) for reporting or distribution.

Export Devices

View Device Activity History

The History column of the Devices page offers access to review the activity (provision, configuration, and assignment) history of each device.

While working in Devices:

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

Check Registration Status

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

Check Registration Status

Configure a Device

Configure

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

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

While working in Devices:

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



Swap Device

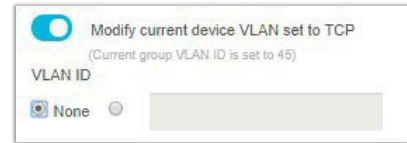
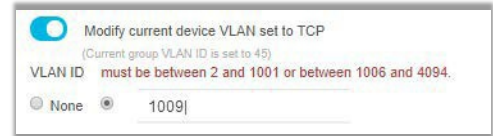
While working in Configure Device:

1. Click to toggle the Swap Device setting switch to **ON**.
2. Select the New MAC ID from the drop-down list.
3. Select the New Device Type from the drop-down list of available options. OR – Click the setting toggle switch to **disable**.
4. Click **Save** to update the information and close the dialog or click **Close** to exit.

Modify Current Device VLAN Set to TCP

While working in *Configure Device*:

1. Click to toggle  the switch to **Enabled**.
2. OR - Click the setting toggle to disabled 
3. Click to set to None (default), or
4. Click to enable and Enter a **VLAN ID** in the field (must be between 2 and 1001 OR between 1006 and 4094).
Where in use, the current Group VLAN ID default is provided as a reference. In this example the current Group VLAN ID is 45.
5. Click **Save** to update the information, OR – Click **Close** to exit the dialog without making changes.

Set Device FQDN Assignment

While working in *Configure Device*:

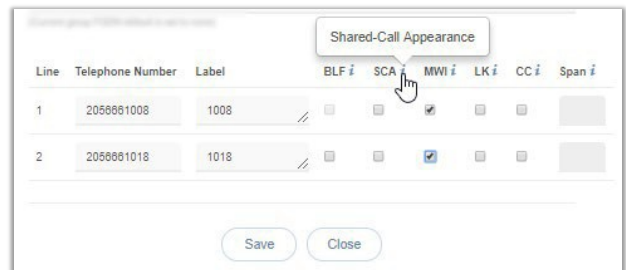
1. Click within the **FQDN** field to select from the available *Fully Qualified Domain Name* options in the drop-down list.
2. Click **Save** to update the information, OR – Click **Close** to exit the dialog without making changes.



Set Device Line Assignments

While working in *Configure Device*:


1. Define the following information for each line on the device (line 1, line 2, etc.), as needed:
 - ❖ **Telephone Number** – Select a ten-digit telephone number for the line from the drop-down list of available options.
 - ❖ **Label** – Enter the extension or select from the drop-down list of available options.
 - ❖ **BLF** – Click to place a check in the corresponding check box to enable *Busy Lamp Field* (presence information) for any secondary line(s).
 - ❖ **SCA** – Click to place a check in the corresponding check box to enable *Shared Call Appearance* for the line. SCA is not available to be selected for a line if the service (telephone number) is not already provisioned on another device.
 - ❖ **MWI** – Click to place a check in the corresponding check box to enable *Message Waiting Indicator* on the line. Recommended.
 - ❖ **LK** – Click to place a check in the corresponding check box to enable *Line Key Span* on the line.
 - ❖ **CC** – Click to place a check in the corresponding check box to enable / require *Contact Center Agent Sign-On* for the line.
 - ❖ **Span** – Enter the number of line keys (digits) to be used for agent login in the space provided.
2. Click **Save** when all necessary configuration information for the device has been defined.



Line	Telephone Number	Label	BLF	SCA	MWI	LK	CC	Span
1	2056661008	1008	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	2056661018	1018	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Modify Device Configuration

While working in Devices:

1. Select a device within one of the Device Tab lists.
2. Click the **Configure**  button adjacent to it.
3. Make changes to the current device settings or line features, as needed.
4. Click **Save** when all necessary configuration changes for the device have been defined.

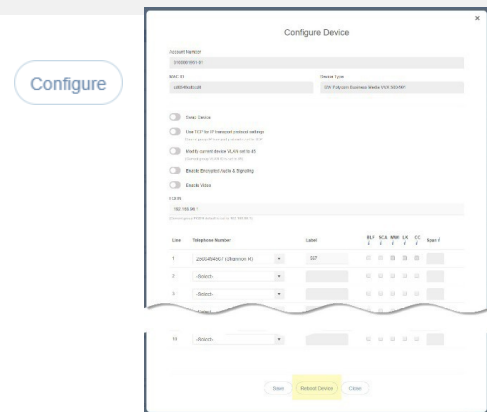
The system updates and the dialog closes and returns focus to the Devices list view.

Reboot a Device

While working in Devices:

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

The device is directed to reboot and update configuration data.



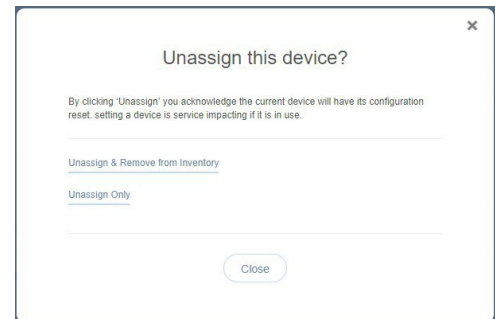
Unassign a Device

While working in Devices:

1. Click on the **Unassign**  button adjacent to the device to be unassigned to begin. Admins have two options when Unassigning devices – to remove the assignment **or** to remove the assignment **and** delete the device from inventory.

Unassign Only

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



Unassign and Remove a Device from Portal Inventory

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

1. Click on the **Unassign & Remove from Inventory** link in the **Unassign the device?** dialog to remove the assignments **AND** delete the selected device from inventory.
2. Click **Yes** to confirm the action if prompted.

Manage Unassigned Devices

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

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

The additional tools include:

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

Edit Unassigned Device Inventory Data

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

While working in Devices:

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

Remove an Unassigned Device from Portal Inventory

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

While working in Devices:

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

For assigned devices, Ref: [Unassign and Remove a Device from Portal Inventory](#)

*IP Trunking

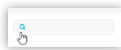
Only organizations that have specialized Trunk Groups will see this section and only Authorized Administrators will have access to this section's management tools.

Trunk ID	Location	Start Date	IP Address 1	IP Count	Assigned DID's	Group Policy	Service State	Direction	Manage Associated DID's Call Logs for Location
72385	IPTrunking test location	05/22/2019 11:37:07 AM	1.1.4.100	4	0	round_robin	inservice	both	Call Logs
72386	IPTrunking test location	05/22/2019 11:44:06 AM	1.1.4.9	3	0	top_down	block	both	Call Logs

Trunking Information

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

Section Search



Locate data found within the IP Trunking table.

Column Tools

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

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

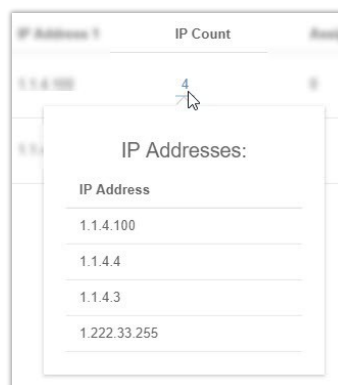
Edit



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

Trunk Group IP Count

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



Manage Associated DIDs

Use Caution. Any association changes are committed immediately upon clicking *Submit*. Authorized Administrators may assign DIDs for IP Trunk Groups. When assigning DIDs to a trunk group or un-assigning DIDs from a trunk group, the selected DIDs are held in the *Pending DID(s)* bucket until Administrator clicks *Submit* for the order.

While working in the IP Trunk Group page:

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

View Trunk Group Call Logs


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

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

Export Call Logs

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

Manage Trunk Group Settings

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

Manage IP Trunk Call Paths

See: IP Trunking Call Path

*Enterprise Trunking

Only organizations that have specialized Enterprise SIP Trunk Groups will access this section and only Authorized Administrators may be granted permission to work with these management tools.

Enterprise Trunking

Enterprise Trunk Name: Manage Associated DIDs

Max # of Reroute Attempts (max 10):

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

Route Exhaustion Action

None

Forward to Phone

* Trunk Group Weight must be an integer between 1 and 65536
* Trunk Group Priority must be an integer between 1 and 10

Trunk Group	Available / Assigned	Priority	Weight	Manage Trunk
2100017914-at01	<input type="button" value="Assigned"/>	<input style="width: 40px;" type="text" value="10"/>	<input style="width: 40px;" type="text" value="10"/>	<input type="button" value="Edit"/>
2100017914-phi01	<input type="button" value="Assigned"/>	<input style="width: 40px;" type="text" value="10"/>	<input style="width: 40px;" type="text" value="50"/>	<input type="button" value="Edit"/>
2057300443TRUNK	<input type="button" value="Assigned"/>	<input style="width: 40px;" type="text" value="0"/>	<input style="width: 40px;" type="text" value="0"/>	

Enterprise Trunking Information

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

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

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

Other tools on this page include:

Manage Associated DIDs

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

Save / Cancel

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

Column Tools

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

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

Edit



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

Manage Enterprise Trunking Routing

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

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

Assign Enterprise Trunk Group

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

To manage this setting while working in Enterprise Trunking:

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

Manage Associated DIDs

Manage Associated DIDs

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

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

Moved items are placed in the Pending DID(s) section until the user clicks Submit.
 - ❖ Click **< Undo/ Undo >** to return selected items in *Pending* to their original section.
 - ❖ Click **Cancel** to quit and exit without making changes.
5. Click **Submit** when finished to save the change(s).

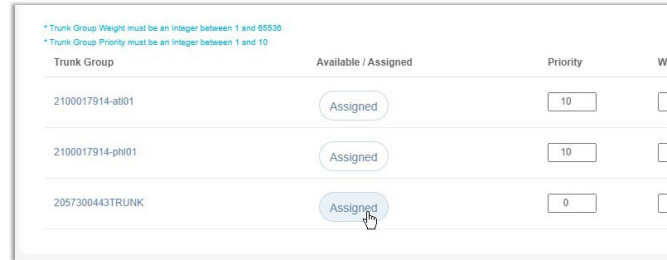
These changes are committed immediately and the items in *Pending* are moved to the appropriate section for review.

Manage Enterprise Trunk Group Priority

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

To manage this setting in the Enterprise Trunking page:

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

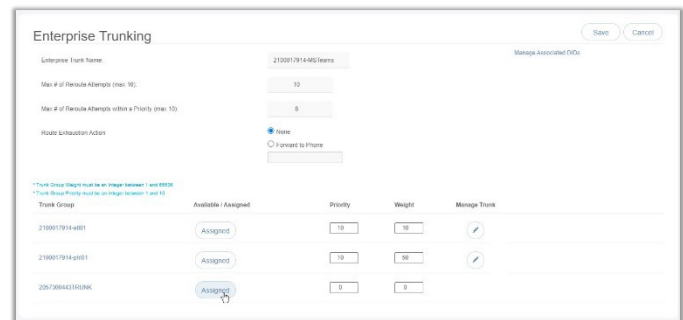


Trunk Group	Available / Assigned	Priority	Weight
2100017914-at01	Assigned	10	
2100017914-ph01	Assigned	10	
2057300443TRUNK	Assigned	0	

Manage Enterprise Trunk Group Weight


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

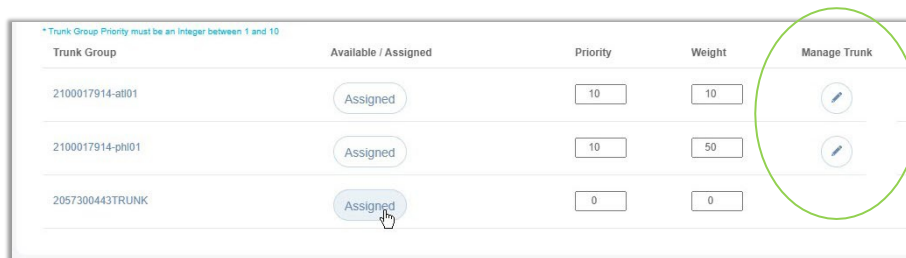
1. Locate the Trunk Group within the table list.
2. Click within the **Weight** field.
3. Define a value (1-65536) using the selection tool.
4. Click **Save** (top right) to submit the change.



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

Manage Enterprise Trunk Group Settings

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



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

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

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

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

- Name: 21000176
- Department: None
- Maximum Active Calls Allowed: 60
- Maximum Incoming Calls Allowed: 2
- Maximum Outgoing Calls Allowed: 2
- Enable Authentication:
- Authentication User Name: test@1
- Type New Authentication Password: [Empty field]
- Trunk Group Identity: 21000176.com@myvmm.us
- OTG/DTG Identity: [Empty field]
- Enable Trunk Group Prefix:
- Allow calls directly to trunk group with trunk identity:
- Allow calls directly to trunk group with DTG identity:
- Include trunk identity for call to trunk group:
- Include DTG identity for call to trunk group:
- Enable network address identity:
- Allow unscreened calls:
- Allow unscreened emergency calls:
- Route to peering domain:
- Peering Domain: None
- Trunk Group User Lookup Policy: Use this trunk group policy (Extended)
- Calling Line Identity Source For Screened Trunk Group Calls Policy: Use this trunk group policy (Profile Name Profile Number)
- Support Connected Identity Policy: Use this trunk group policy (Disabled)
- Pilot User Calling Line Identity for External Calls Usage Policy: All Originating Calls
- Pilot User Calling Line Identity Usage for Emergency Calls Policy: No Calls
- Pilot User Charge Number Usage Policy: No Calls

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

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

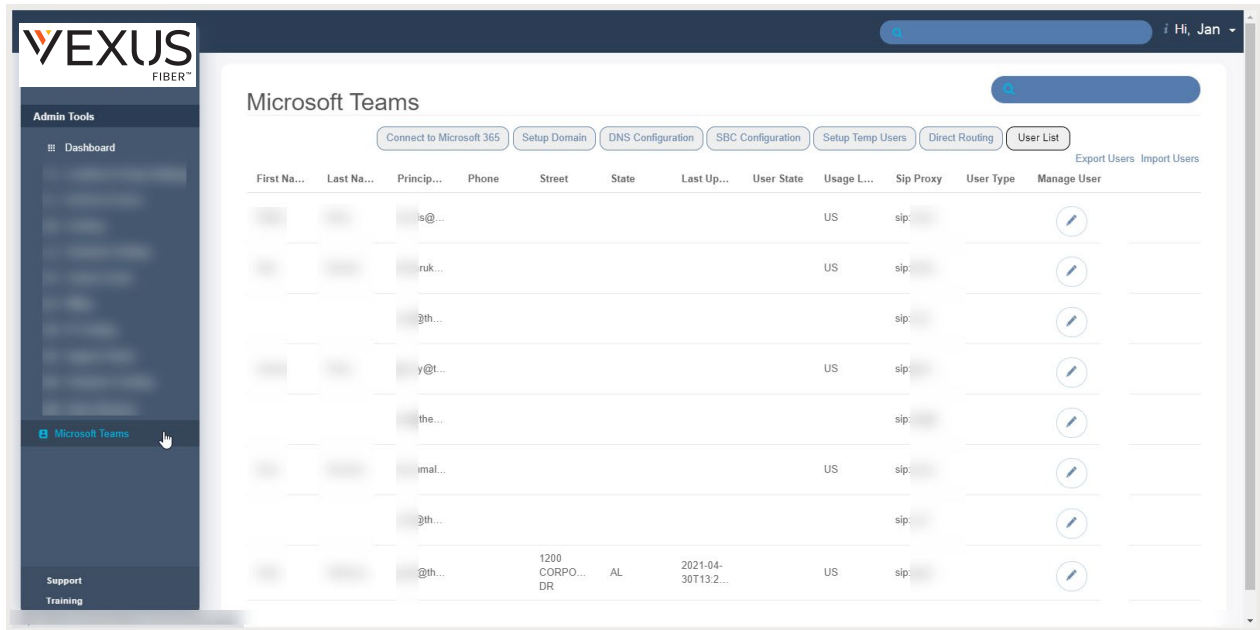
- ❖ * Name: Provider Access Only.
- ❖ Department: Optional – Select a department from the drop-down selection tool, as needed.
- ❖ * Maximum Active Calls Allowed: Provider Access Only.
- ❖ Maximum Incoming Calls Allowed: Provider Access Only.
- ❖ Maximum Outgoing Calls Allowed: Provider Access Only.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

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

*Microsoft Teams

Restricted Access. Only organizations that have Microsoft Teams integrations may see this section and only Authorized Microsoft Teams Administrators will have access to these management tools.

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



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

Microsoft Teams




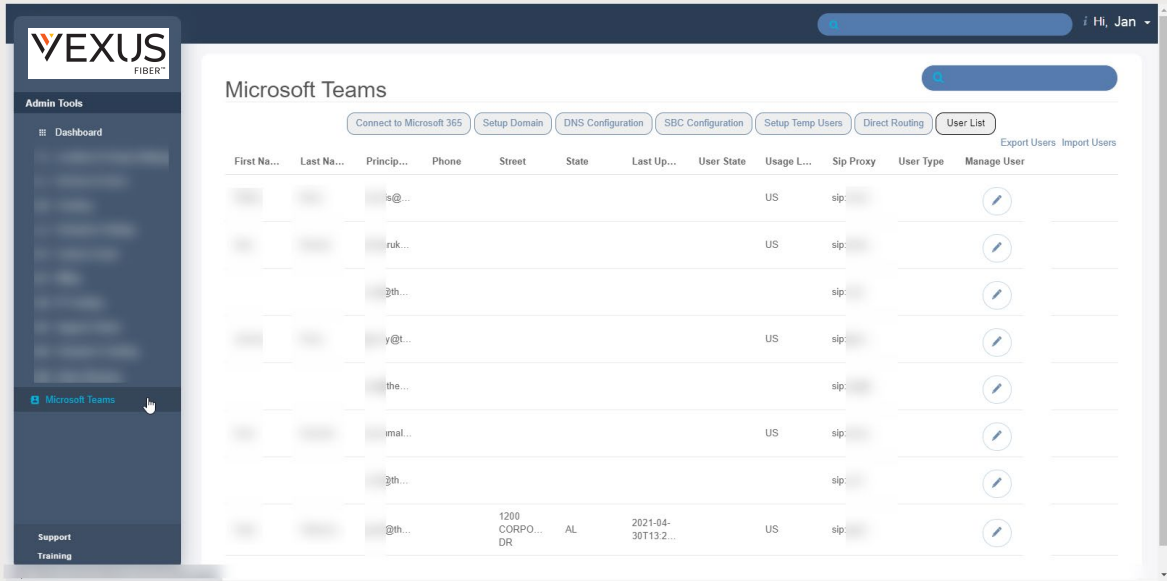
- ❖ **Connect to Microsoft 365** - For Deployment tasks. Restricted/Limited access for Teams Admins
- ❖ **Setup Domains** - For Deployment tasks. Restricted/Limited access for Teams Admins
- ❖ **DNS Configuration** - For Deployment tasks. Restricted/Limited access for Teams Admins
- ❖ **SBC Configuration**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

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

User List

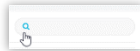
This Microsoft Teams tab section is the default post-deployment view for Authorized Teams Admins.

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



The screenshot shows the 'Microsoft Teams' section of the VEXUS portal. The top navigation bar includes 'Connect to Microsoft 365', 'Setup Domain', 'DNS Configuration', 'SBC Configuration', 'Setup Temp Users', 'Direct Routing', and 'User List'. Below this is a table of users with the following columns: First Name, Last Name, Principal Name, Phone, Street, State, Last Up..., User State, Usage L..., Sip Proxy, User Type, and Manage User. The 'Manage User' column contains edit icons for each user row.

Section Search



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

Columns

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

Edit



The **Edit** icon for each listing in the opens the User's Edit dialog for TN assignment or Direct Routing maintenance.

Export Users

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

Import Users

Advanced Access. Teams Admins Only. Use this link to import a correctly formatted .csv file containing specific User data from your local files into the portal to update user settings. Use with caution. Contact Customer Support for assistance.

Search Teams User List

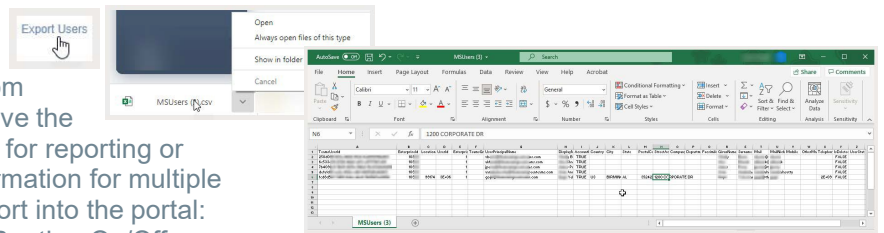
The section **Search** field at the top of this tab allows the Admin to enter terms to find within the User List. Matching listings display for review or selection. Remove the search term from the field to redisplay the full default list view.

Export List

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

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

2. Click on the **MSUser (x).csv** file that displays at the bottom of the browser to open or save the file locally. This file is useful for reporting or to update the following information for multiple users at once and then import into the portal: TN Assignment and Direct Routing On/Off




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

Import List

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

Manage Teams User TN Assignment

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

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

While working in Microsoft Teams > User List:

The Update Microsoft Teams User dialog displays. In this view only the TN Search field at the top of the list allows the Admin to make changes, but the other fields are read-only.

2. Click within the TN Search field to use the dynamic search tool to locate unassigned TNs in your inventory that can be selected for this user. As you type a useful search entry, the list will filter to show any available TNs that contain matching information for review and selection.
3. Click on an item within the search results to select it and assign it to the user. The system will automatically update this Teams User's settings to use this TN for Teams calls.

Update Microsoft Teams User Disable Direct Routing

TN Search: 29

Assigned DID / Seat: **test m4854 2057187861**

Location: **test m4855 2057187869**

First Name: **line3 #911 DID 2057188480**

Last Name: **line2 #911 DID 2059187210**

User Principal Name: **themoat@greenteam.com**

Street: **1200 CORPORATE DR**

City: **BIRMINGHAM**

State: **AL**

User State Changed On: **2021-04-30T13:28:44.197**

User State:

Usage Location: **US**

Slip Proxy Address: **themoat@greenteam.com**

User Type:

Other Mail:

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

Manage Teams User - Direct Routing

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

While working in Microsoft Teams > User List:

1. Click on the [Edit](#) icon  adjacent to the desired User within the list in the far-right *Manage User* column.

The Update Microsoft Teams User dialog displays. In this view there is a button to Enable or Disable DirectRouting for the Teams User. Only the TN Search field can be edited.

2. Click on the Enable/Disable Direct Routing button (top right).

This button is dynamic and shows the action that can be taken currently.



For example, when Direct Routing has already been setup the button displays Disable Direct Routing.

Enable: Ensure a TN has been assigned and confirmed. Then click [Enable Direct Routing](#).

Disable: Click the [Disable Direct Routing](#) button. Use Caution: this action also removes the TN Assignment and cannot be undone.

Once clicked, the system will display a confirmation dialog.

3. Click on the [Yes](#) button to continue and make the change - or click [No](#) to stop and return to the list view.

The system will update and display a message upon successful completion, or in the case of an error, will offer an error message. Contact your organization's MS Teams Admin for assistance. Upon completion, the user may exit this dialog and click on Microsoft Teams in the left Navigation Menu to return to the User List - or select another area of the Cloud Services Portal to review.

Connect to Microsoft 365

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



Microsoft Teams

Connect to Microsoft 365 | Setup Domain | DNS Configuration | SBC Configuration | Setup Temp Users | Direct Routing | Users List

Trunk: 3100001951-MSTeams

User Name: gopi@themountgreenteams.com

Password:

PSTN Primary Gateway: 3100001951-at01.completeuc.com

PSTN Secondary Gateway: 3100001951-ph01.completeuc.com

Save | Verify Credentials | Continue

Deployment Notes

To begin, the Deployment Wizard helps the Admin initiate the connection to the Microsoft 365 Tenant. Provide the User Name and Password credentials for the Microsoft 365 Tenant and click Save. Note: These credentials must have Admin access and Powershell* command execution privileges to set up Direct Routing.

After the User Name and Password are saved, click on the Verify Credentials button to test the credentials and ensure that the assisted deployment wizard is able to connect to the Microsoft 365 Tenant.

When completed and the connection is verified, click Continue to move on to the next step.

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

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

Post-Deployment: The User Name and Password may be updated (and verified) by an authorized Teams Admin when necessary. All other fields remain read-only.

Add Microsoft Teams Account Admin Access Credentials

1. Enter Microsoft 360/O360 User Name and Password credentials
2. Click [Save](#) to update.
3. Click [Verify Credentials](#) - the system will verify and provide a notification of **success** or **failure**.
Check the account information in Microsoft 365/Teams and retry entry of username/password credentials as necessary until a successful connection is made.
4. If this is the initial deployment, click [Continue](#) (or click on the Setup Domain tab) to proceed to the next deployment step - or select another Admin Tools menu option to complete other tasks.

Edit Microsoft Teams Account Admin Access Credentials


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

1. Enter new Microsoft 360/O360 User Name and Password credentials
2. Click [Save](#) when the new credentials successfully verify.
3. Click [Verify Credentials](#) and wait for the success notification.
Check the credentials, re-enter as necessary, and try again if verification is unsuccessful.

Setup Domain

This Microsoft Teams tab section is for deployment of Teams on the account and has restricted/read-only access for Teams Admins.

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

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

View Domain Information for Direct Routing

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

DNS Configuration

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

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

The screenshot shows the 'Microsoft Teams' deployment wizard. At the top, there are navigation tabs: 'Connect to Microsoft 365', 'Setup Domain', 'DNS Configuration' (which is selected), 'SBC Configuration', 'Setup Temp Users', 'Direct Routing', and 'Users List'. Below the tabs, a message states: 'The following represents the request to add DNS records to completeuc.com zone'. The interface is divided into two main sections. On the left, there is a 'Ticket Information' section with the following details: 'DNS Ticket ID: 01050066', 'DNS Ticket Created On: 3/5/2021, 1:43:55 AM', and 'Ticket Status: Closed'. Below this, a text box contains instructions: 'Please add the following A and TXT DNS records to the completeuc.com zone:'. It lists two sets of records: one for IP 208.86.134.200 and another for IP 162.244.101.70, each with a corresponding TXT record for MS=msf3779945. At the bottom left, there are 'Create Ticket' and 'Continue' buttons. Below the buttons, it shows 'DNS Ticket Created: 3/5/2021, 1:43:55 AM' and 'DNS Ticket Completed: 3/5/2021, 2:19:29 AM'. On the right side, there is a 'Deployment Notes' section with the following text: 'In this step, the Deployment Wizard allows the user to submit a pre-defined ticket containing the correct information (collected from the previous steps) which is sent to the Support Team requesting the update for DNS entries in preparation for the next deployment step (SBC Configuration) for the Microsoft 365 Tenant. Click the Create Ticket button to submit the setup request to Support. When completed and confirmation is displayed, click Continue to move on to the next step.'

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

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

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

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

Create DNS Configuration Ticket

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

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

SBC Configuration

This Microsoft Teams tab section is for deployment and has restricted access for Teams Admins. During the deployment process, it provides access for an authorized Teams Admin to create and submit a request for SBC/FQDN creation for the account. The Notes section provides instructions for tasks that can be performed in this area for the deployment.

The screenshot shows the 'Microsoft Teams' tab with a navigation bar containing buttons for 'Connect to Microsoft 365', 'Setup Domain', 'DNS Configuration', 'SBC Configuration' (which is highlighted), 'Setup Temp Users', 'Direct Routing', and 'Users List'. Below the navigation bar, there is a section titled 'The following represents the request to add MS Teams SBC functionality'. This section contains a table with the following data:

SBC Ticket ID:	01058190
SBC Ticket Created On:	3/9/2021, 10:33:16 PM
Ticket Status:	Closed
	RPX Account Number: 3100001951 Customer Name: Mount Green Logistics, LLC, LLC RPX Switch Name: BSFTATLR
	FQDNs: 3100001951-af01.completeuc.com and 3100001951-ph01.completeuc.com

Below the table are two buttons: 'Create Ticket' and 'Continue'. At the bottom left, there is a status bar showing 'SBC Ticket Created: 3/9/2021, 10:33:16 PM' and 'SBC Ticket Completed: 3/17/2021, 10:04:19 PM'. On the right side, there is a 'Deployment Notes' section with the following text:

Deployment Notes

In this step, the Deployment Wizard helps the Admin create and submit a properly formatted ticket to the Support Team requesting set up of routes in the SBC that will handle calls between the Microsoft Teams Tenant and the Network.

Click the Create Ticket button to submit the SBC Setup request to Support.

When completed and confirmation displays, click continue to move on to the next step.

The fields in this tab are auto-populated with the correct information and cannot be edited. An authorized Teams Admin may click the **Create Ticket** button when prior deployment tasks have been completed and then **Continue** to move on to the next step in the deployment process.

Post-deployment: Authorized Teams Admins may review the setup completion notification data and the SBC creation verification information in this tab. All data remains read-only.

Setup Temp Users

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

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

The screenshot shows the 'Microsoft Teams' tab with a navigation bar containing buttons for 'Connect to Microsoft 365', 'Setup Domain', 'DNS Configuration', 'SBC Configuration', 'Setup Temp Users' (which is highlighted), 'Direct Routing', and 'Users List'. Below the navigation bar, there is a section titled 'The following will be added as temporary Microsoft Teams users'. This section contains a table with the following data:

Temp User 1:	tempuser1@3100001951-af01.completeuc.com
Temp User 2:	tempuser1@3100001951-ph01.completeuc.com
License Type:	--Select--

Below the table are two buttons: 'Create Temporary Users' and 'Continue'. At the bottom left, there is a status bar showing 'WAIT 24 HOURS FOR REPLICATION ACROSS THE SYSTEM', '4/6/2021, 12:30:24 PM', and 'Temporary Users Created: 4/6/2021, 12:30:34 PM'. On the right side, there is a 'Deployment Notes' section with the following text:

Deployment Notes

In this step, the Deployment Wizard allows the Admin to select the correct License Type and create temporary users (as shown in the Temp User 1 and 2 fields) within Microsoft 365 to validate the domain configuration setup completed in the previous steps and prepare for Direct Routing setup.

Select the License Type from the drop-down list of options.
Click on the Create Temporary Users button.

Please wait for 24 business hours to allow Microsoft 365 to replicate the domains across their systems.
When completed (and after 24 business hours have elapsed to provide time for propagation through the Microsoft system), click Continue to move on to the next step.

Note: A Microsoft 365 Tenant Admin can remove these temporary test users in the Microsoft 365 portal after the direct routing setup is completed and it has been verified that it is working.

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

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

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

Direct Routing

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

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

The Notes section provides instructions for tasks that can be performed in this tab for deployment.

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

An authorized Teams Admin may click the **Setup Direct Routing** button during Deployment to initiate the setup process.

Note: this process takes approximately 24 business hours to complete and replicate across the system.

Once the setup process is finished, a notification of setup completion displays with a timestamp. The Teams Admin may then click **Continue** to move on to the next tab (**User List**) to complete final steps in the deployment process and manage Teams User TN assignments.

Post-deployment: Authorized Teams Admins may review the completion notification for direct routing setup in this tab.

SUPPORT

The **Support** option in the *Menu* panel (and in the quick access drop-down menu at the top of the screen) provides access to the Support page. This page offers links to useful information and additional applications or tools, including helpful instructions and some configuration and system requirement information, as needed for the account.

Note: Your display of information or links may vary from this example.



CONTACT VEXUS

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

800-658-2150

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

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

Online Support

www.vexusfiber.com

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 efforts to resolve (if any), methods to reproduce, along with your account number and contact information.

Documentation

www.vexusfiber.com/TelecloudU

TeleCloud University is an online knowledge base of training and support content that will equip you with all you need to learn about Vexus'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 as a reference on the Vexus Fiber website.