Billing

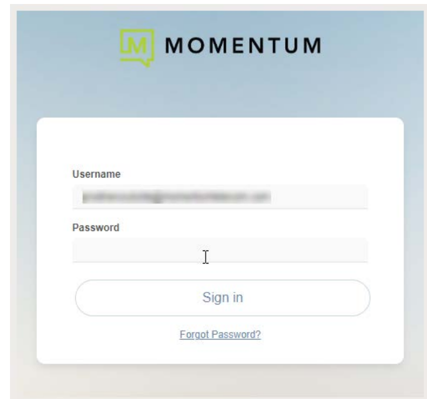
ACCESS THE PORTAL

Cloud Services offers an intuitive web portal that makes it easy for Administrators to customize and manage account features and settings securely while working online.

Sign In

To Access the Cloud Services Portal:

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

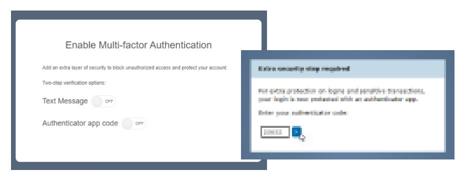


2. Enter the Admin Account Username (xxxxxx@email.com format) and correctly formatted Password credentials in the fields when they are provided/displayed. Note: Password allows up to 30 characters.
   - Use the Forgot Password? link to securely update your password credential. Account holders with a defined email address on file in Manage Users can use this tool and will receive an email with a secure link to change the password. Contact your organization's System Admin for assistance if notified that the process cannot complete or if the system identifies that your account does not yet have a notification email address on file.

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

3. Click the **Sign In** button.
4. Follow any Multi-Factor Authentication (MFA) method setup steps and/or 6-digit code entry requirements if prompted.

The Cloud Services Portal opens when security protocols are met.

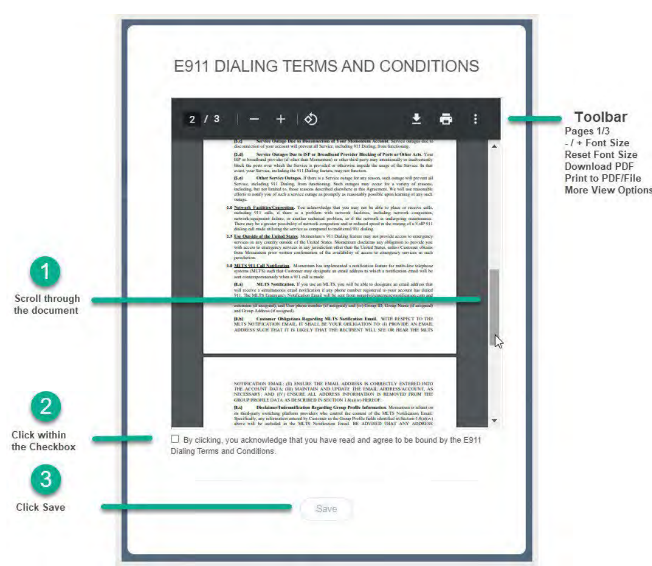


Terms and Conditions

The first time 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 the Terms and Conditions are updated.*

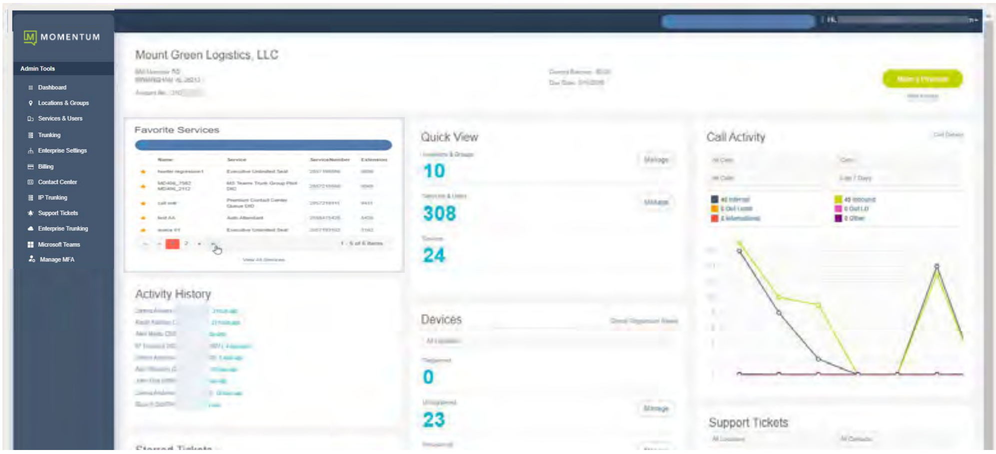


Once you sign into the Cloud Services Portal the first time and acknowledge the Terms and Conditions, you will have access to the tools and features you need - right at your fingertips.

Note: This dialog only displays again if the T&Cs are updated.

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.*



Important Note:
The example shown here is for a multi-service Broadsoft + Teams Voice environment. *The Dashboard for NetSapiens environment accounts differs and offers an SSO link to the NetSapiens portal where cloud voice management/admin tasks are performed. Please reference the NetSapiens Cloud PBX Admin/Manager guide to learn more.*

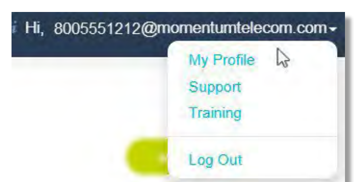
The Dashboard sections display based on purchased services or products and the individual Admin's authorization level as assigned by the organization's SuperAdmin. By default, only the organization's SuperAdmin sees all available Admin Dashboard sections and tools.

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 settings, open the Momentum Support or Training (Momentum University) web pages, and Log Out.

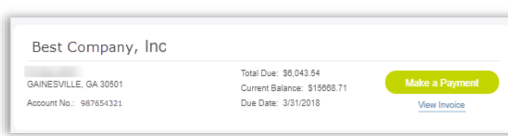


Voice Admin Dashboard Sections

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.

Account Profile

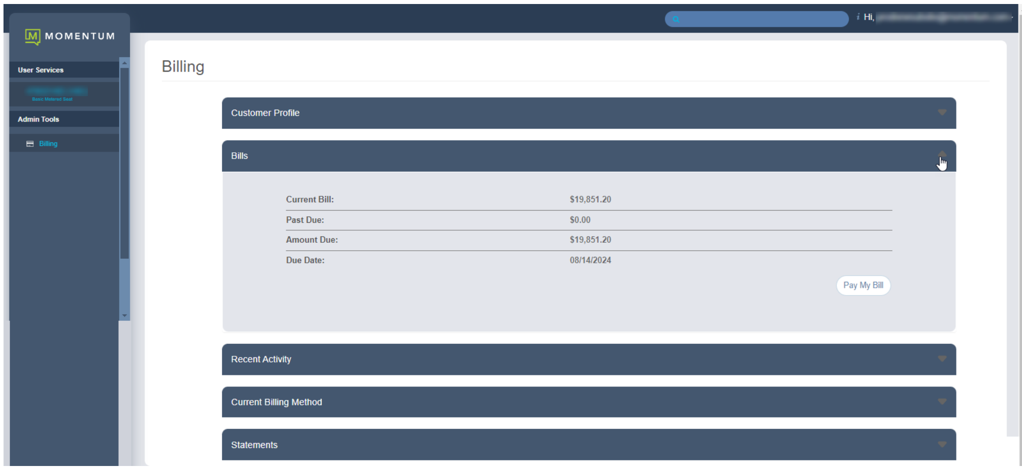
This card at the top of the Dashboard offers general account information, and for authorized Billing Admins - the current balance, the latest invoice information, and a direct access link to the Billing page to make a payment are also displayed.



*Billing

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

The Billing page provides tools for reviewing and managing the monthly billing and payments for the Enterprise account or Locations on the Enterprise Account (where enabled and authorized for use by the organization). Note: *By default, only the Super Admin is automatically granted access to view the Billing section and the billing information displayed in the Dashboard Account Profile widget. The Super Admin has the ability to authorize Billing section/information access for other account profiles currently defined in the system.*

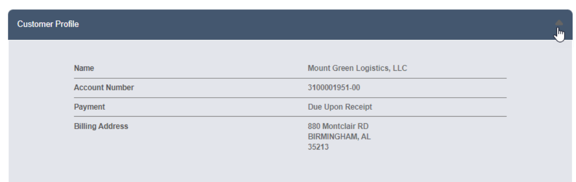


Authorized Billing Admins may also be notified of billing changes, additional charges, or issues in this view.

Note: If enabled by the organization, a drop-down selection tool may display in the Billing page that allows specially authorized Billing Admins to manage accounts payable (AP) per selected 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.

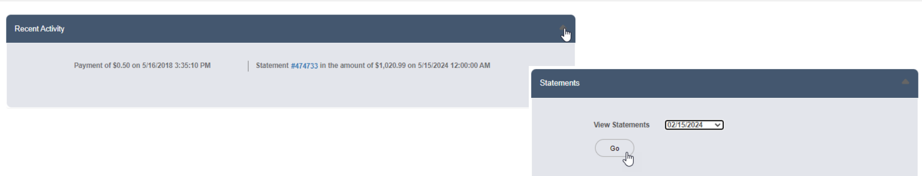


View Bills

The Bills section of the page offers up-to-date information for the Current Billing Cycle, any amounts Past Due, and the Pay My Bill button which offers the option to pay the current bill or setup recurring payments. Where in use by the organization, a drop-down selection tool may display that allows authorized Billing Admins to choose a specific location to review and manage.

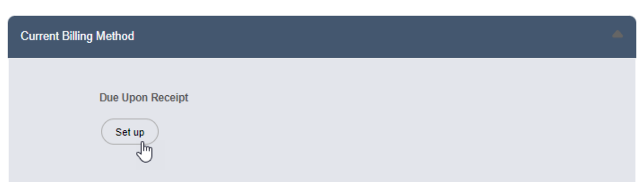
View Recent Activity or Statements

The Recent Activity section displays the current payment information and Statements offers visibility to historical (completed) payment statements.



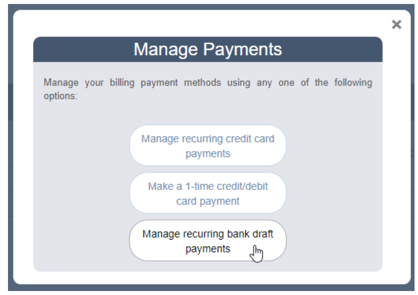
View Current Billing Method

The Current Billing Method section displays the payment method of record and offers another access point to Set Up a recurring payment method.



Pay My Bill

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



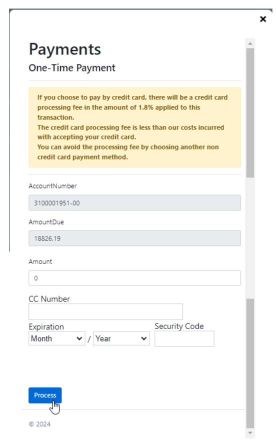
The Pay My Bill button and Set Up buttons both open the *Bills* page where you may manage the following payment method options for your bill:

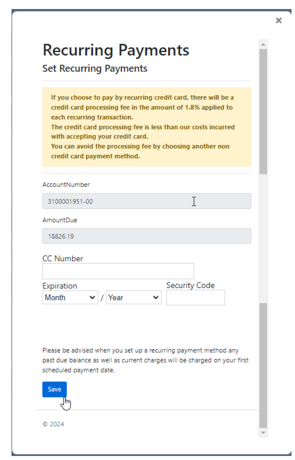
- 1-time credit/debit payment
- recurring credit card payments
- recurring bank draft payments

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

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

Setup a Credit Card Payment Method





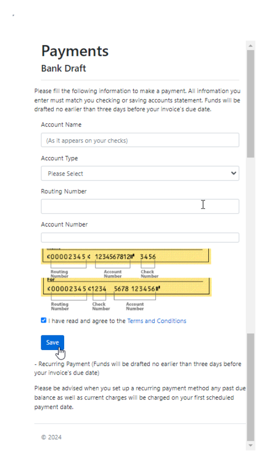
1. Click the Make a one-time credit/debit card payment link to pay the the current bill. If you choose to pay by credit card, a processing fee (1.8%) will be added and applied to each processed credit card transaction.

   Note: Before submission, the system will provide the processing fee amount and the total with the fee amount included. Submitting payment implies consent for the fee.

   OR

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

Setup a Recurring Bank Draft



1. Click the Setup a recurring bank draft link and follow instructions to enter account information and schedule recurring withdrawals directly from a bank account. The system walks you through the process.

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