Cloud Services Portal

Voice Admin

Advanced Provider-Level Tools

Quick Reference

MOMENTUM

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WELCOME

Welcome to the Momentum Telecom family. We are thrilled to be working with you!

We also want to welcome you to the Cloud Services Portal. The Momentum 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 Momentum, 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,

The Entire Momentum Telecom Team

INTRODUCTION

This guide is a convenient, go-to resource for Voice Administrators getting started with the 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 that are provided within the portal for administration of voice-related (and some network) communication features and services that are provided by Momentum Telecom.

We encourage you to take some time to review this document and return to it in Momentum University for future reference as it is updated routinely in that online location. 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 Momentum Team is committed to doing everything possible to deliver an exceptional experience, and we strive to improve every day.

Important Notes:

All decisions regarding Admin access to any of the advanced permission provider level tools that are useful and relevant within the customer's voice environment are made by the Service Provider.

The Advanced Permission Service Provider-level tools shown in this guide are not authorized for use or activated in most Customer subscriptions. Please note that this document describes tools designed for use by Service Provider staff, and introduces features generally unavailable to customer organizations and their staff. The Service Provider can authorize ***partial access*** *to these tools - in which case, some of the features described here may not be authorized for use in your subscription, deemed necessary for your system, or offered to your organization by the Service Provider.*

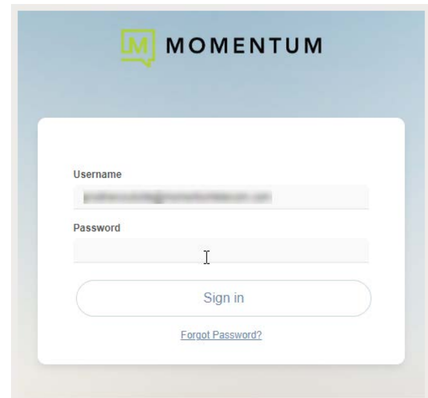
Access the Portal

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

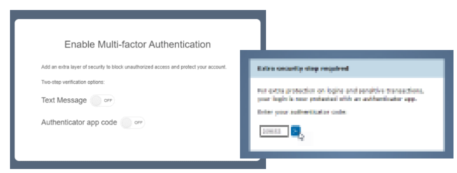
To Access the Cloud Services Portal:

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 or the Service Provider primary contact (Support, AM, or PM).



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

   Note: For your security, the link provided in the *Forgot Password* email is only active for 60 minutes - once that time limit expires, you must use the 'Forgot Password?' feature again to generate a new email with an active link to proceed, or contact your organization's Subscriber Portal SuperAdmin for assistance.
3. Click the **Sign In** button.
4. Follow any Multi-Factor Authentication (MFA) method setup steps and/or 6-digit code entry requirements if prompted.
   The Cloud Services Portal opens when security protocols are met.

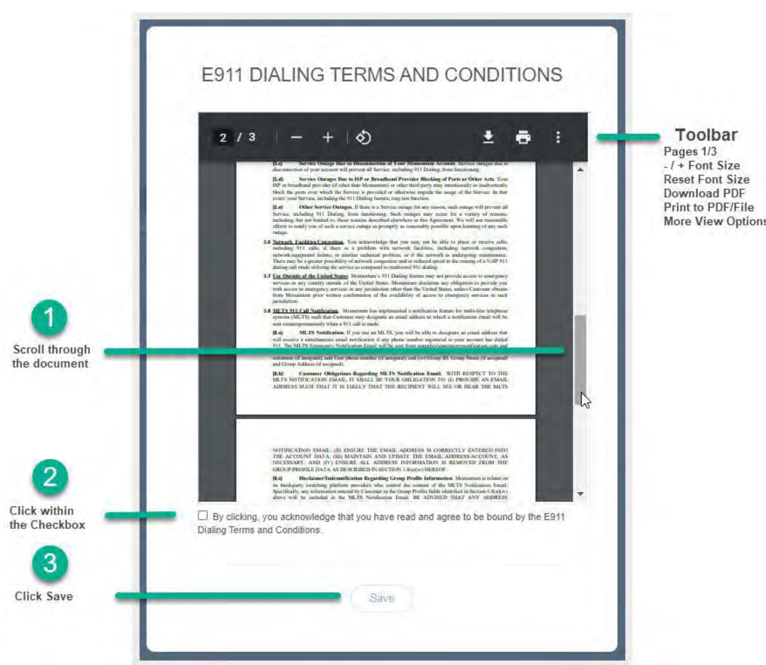


Terms and Conditions

The first time 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 to easily manage your communications features - right at your fingertips.

Advanced Provider-Level Sections

If it is determined that access may be granted, the Service Provider will define the level of access granted to the organization's SuperAdmin for the account, who will then be allowed to define the permissions the Service Provider defines for best usage for other Administrators (if any) who they wish to be granted access to one or more provider-level or advanced permission sections and any authorized tools that may be found within them. These are areas where improper usage can and will negatively impact billing or service.

As a best practice, access to Service Provider-level tools will not be granted by the Service Provider until well after implementation and system stabilization have been completed - in general it may be considered six months to a year after go live. Before the Service Provider will discuss access, Administrators must have demonstrated general expertise with the typical administration tools within the portal along with an evident reduction of Support Ticket submissions requesting assistance for the default tasks that an Admin can perform in the portal. As a rule such access can be discussed with your Account Manager 6 months to a year after hand-off to AM/Support following implementation completion (go live).

Only Authorized and trained Administrators should be provided with access to view or work with any of the tools the Service Provider authorized. By default, when these areas are made available to an organization, only the SuperAdmin is granted access after training is completed and no other Administrators have access permissions defined initially. The SuperAdmin will receive an initial comprehensive training to ensure their organization remains secured and to help them to limit the potential negative impacts to services and/or billing when using these tools or when assigning other Admins sufficient access to work within these sections. Best Practice: All Admins who will access any tools in these sections should be required to complete the specialized additional training prior to access being granted by the Service Provider and the SuperAdmin.

Potential Support Impacts:

Momentum Telecom provides expert, 24/7 assistance and maintenance for our customers. This exceptional level of service is how we make sure each and every customer is well taken care of and their systems continue to be healthy and problem-free.

The Advanced Permission Service Provider-level areas will only be authorized for and Admin's use by the Service Provider after a period of system stability has elapsed. These tools are also 'use at your own risk'. Great caution should be used when planning to offer additional access to any of the tools in these Advanced Permission areas to any members of your staff.

Should the leadership of your organization decide to discontinue that hands-on support service experience and attempt to implement self-management of additional billing and service impacting areas of the telephony and integrated services on your system instead, it is recommended that caution should be used when deciding whether to allow Admins to be trained to use and then granted access to one or more of the Advanced Permission Sections. Enabling access to these sections requires the assistance of the Service Provider. To protect customers' accounts from accidental misuse, completion of additional training on the proper use of the provider-level tools in each of these areas is often a prerequisite prior to the Service Provider enabling access and setting up individual Admin tool access to those areas.

It is also *recommended* that additional 'self-management' not be attempted or enabled until well after the system's implementation has been completed and has been live and in stable use for some time. The typical period the provider allows for confirmation of the system's health and Administrator proficiency with all other tools is approximately 6 months post-implementation for billing/service impacting Provider-Level Advanced Permission sections.

The SuperAdmin can contact Account Management to discuss whether additional access to advanced permission provider-level tools for some of your Administrators, their responsibilities once some or all access is granted, and to clarify any changes to support levels that the use of these tools may entail.

While additional access to self-manage many single-process tasks that are typically handled only by the Service Provider can be made available in these Advanced Permission Sections if the Service Provider has evaluated that some level of access beyond the default tools is warranted, the additional access that might be granted to advanced permission tools does not allow Admins to perform ALL typically provider-level only tasks from within this portal. Tasks that cannot be performed from the Cloud Services Portal will still need to be performed by the Service Provider, and in those cases, an authorized contact for the organization will still be required to call or contact the Service Providers' Support team for assistance with those fully provider-level actions or tasks.

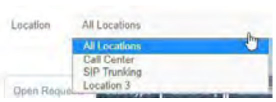
*SERVICE CHANGES

Restricted Access - Provider level - Billing and Service Impacting

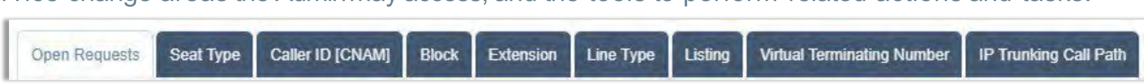
The Service Changes section of the Cloud Services Portal is a secured section of advanced Administration tools that requires additional authorization and training prior to access/usage.

The Service Changes section provides authorized access to a searchable list of the current in-progress service orders/ changes for the account and the current status of each. Advanced Tools typically offered could include the ability to view Service assignments by Location, Manage or Change some services or 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 specially authorized Admins as they work.

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

	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.
	Opens the Add Service view to allow selection and configuration of new service requests/orders.
	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.
View All Service Changes	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.

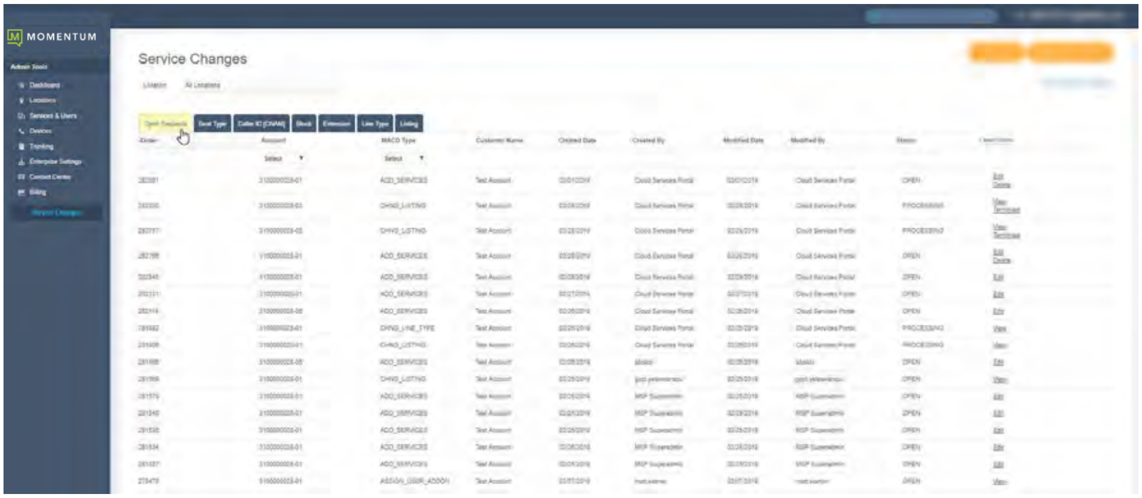
The default view when the Service Changes page displays is the Open Requests tab for *All Locations*. Information is provided in a sortable table view. Tabs above the table offer access to all of the service change areas the Admin may access, and the tools to perform related actions and tasks.



Please Note: Areas the Service Provider could make available for advanced management tasks can include Seat Type, Line Type, Caller ID [CNAM], Block, Extension, Listing, Virtual Terminating Number, and IP Trunking Call Path, however it is important to be aware that the majority of those sections are not useful and should not be enabled in Teams environments.

Open Requests

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



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.

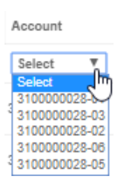
Filter Open Requests

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

Order Number

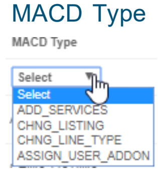
Type an order number or part of an order number to filter the list to show only matching items. The table will dynamically update, and filter further as matching numbers are entered.

Account



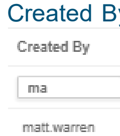
Select an account number option from the drop-down list to only show open requests for that account

MACD Type



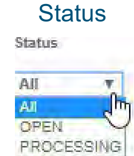
Select an available MACD (move, add, change) type from the drop-down list to show only the selected type in the table below.

Created By



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



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

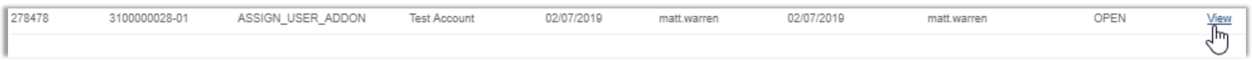
Clear Filters

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.

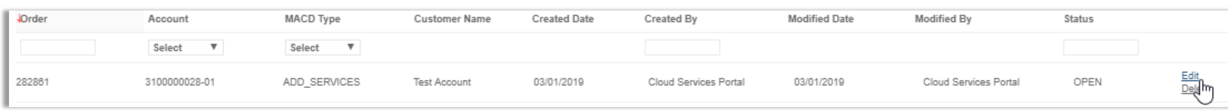


2. Click Close when finished to exit the dialog and return to the review the list of Service Change requests.

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.



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

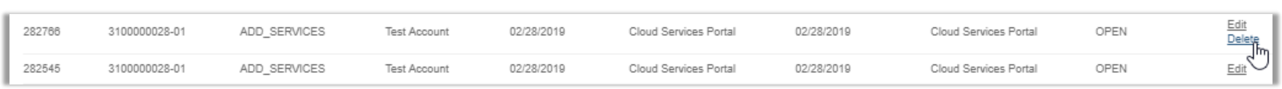
   Note: Each service change type requires specific information for configuration. The system will assist users and notify if any missing information is discovered during the auto-confirmation process it completes prior to allowing the order to be submitted.

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

Delete a Service Change Order

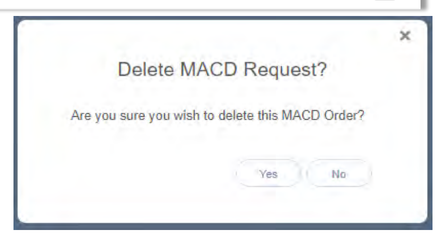
If a service change order can be deleted, the option to do so is provided.

1. Click on the Delete link adjacent to the desired item in the far right column.



2. Click Yes when prompted to confirm the action.

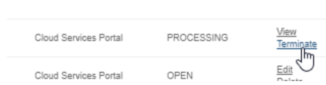
   The service change order is deleted, and the system updates the list of Open Requests. The history of the action is also recorded and may be reviewed by clicking on the View All Service Changes link at the top of the Service Changes section.



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.



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

It is important to note that while additional access to perform many self-management tasks is possible, some order and change related tasks cannot be performed by a Customer Admin within the portal - and - contacting the Service Provider for assistance with changes or orders that cannot be performed here will still be required for those actions.

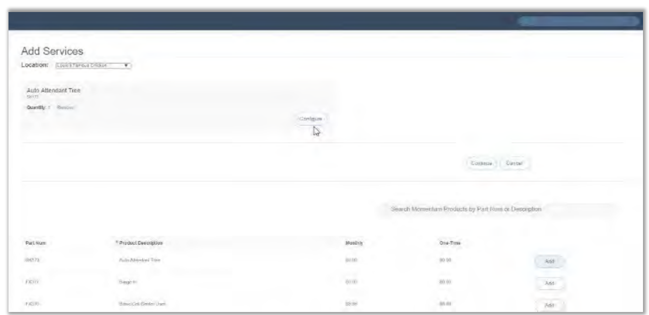
Add Services

Provider Level Tools. Authorization/Permission from Momentum Management and specialized training must be completed prior to activation/usage. 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 will be incurred when adding products that have NRC/MRC charges.

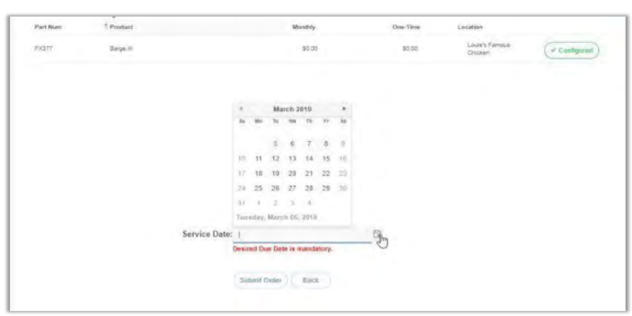
Pricing is listed and a contract-level Price Book is provided to assist Admins.

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.

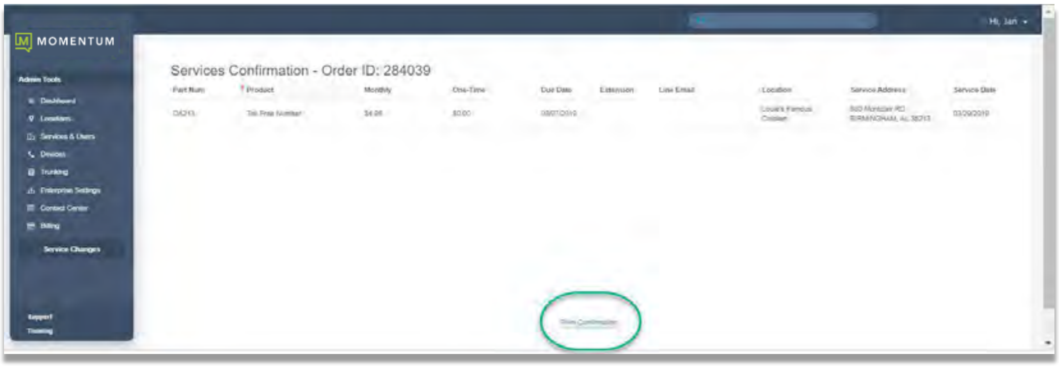


4. Click the Add button adjacent to the desired item to select it.
   The selected item is displayed at the top of the page to allow for *configuration*.
   Most service change types require specific configuration information in order to submit for processing. The system will assist users and notify 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.

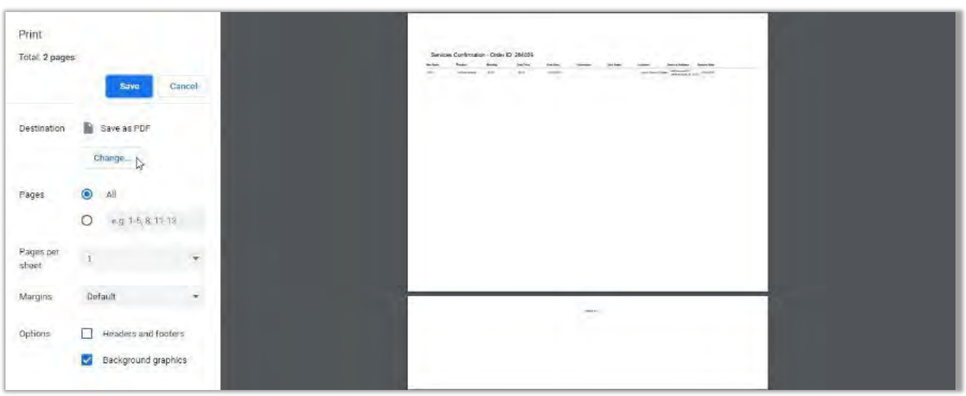


Print Service Change Confirmation

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

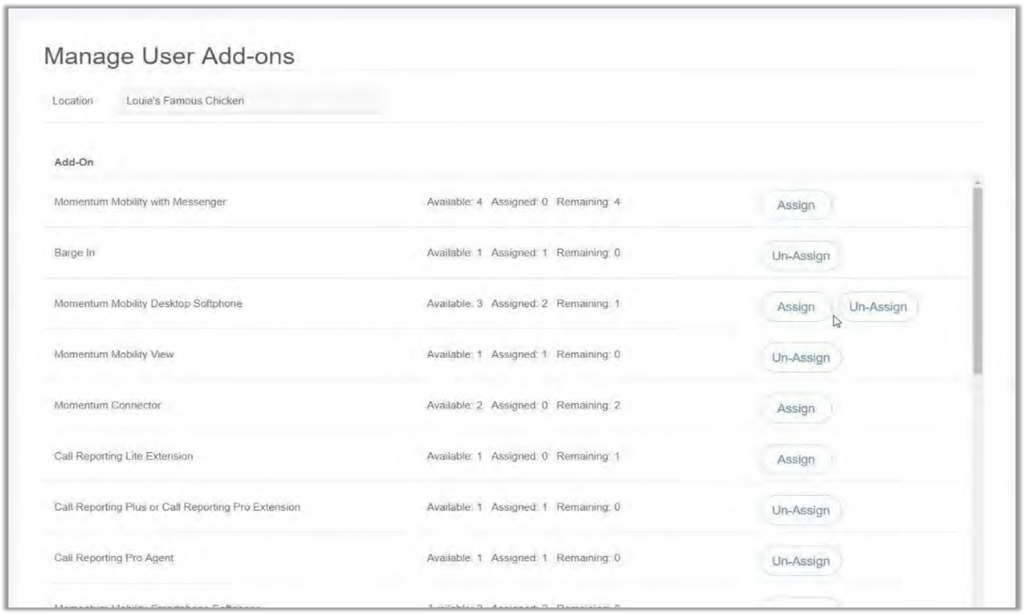


1. Click on the Print Confirmation link (bottom of the page) to open the Print dialog.
2. Accept the default settings (PDF, All pages, to local file…) to print all that is displayed per page, or select from the following print options:
   - Destination: Click Change to specify the print type and file 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.

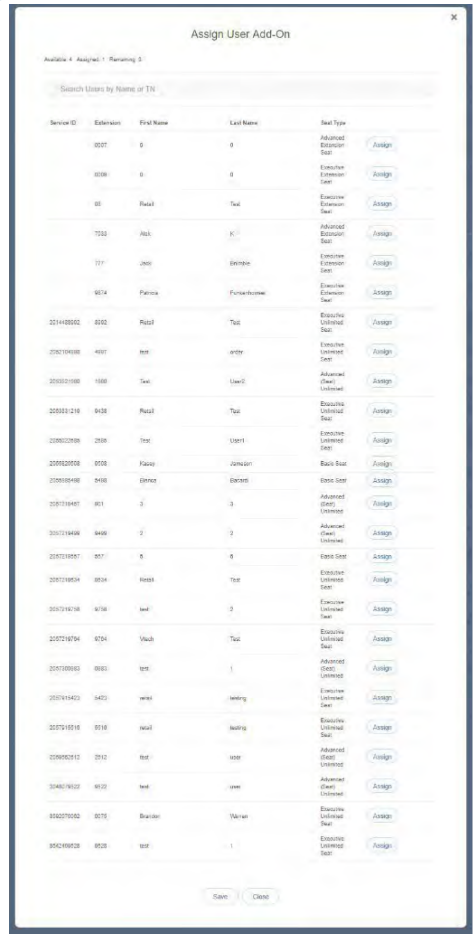


- This view provides access to lists of the current user add-on services.
- Filter the view using the Location selection tool at the top of the page (required).
- Each item in the list offers details that include:
- Add-On (service name)
- Available, Assigned and Remaining add-on counts
- Management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



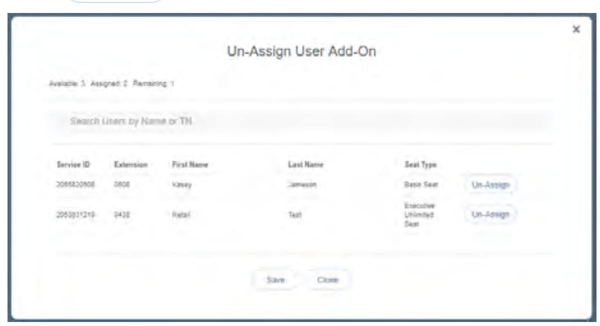
1. Click the Assign button adjacent to an Add-On (far right column).

   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.

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.

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	3999347877uy@ykkkkku.com	04/24/2019	3999347877uy@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	3999347877uy@ykkkkku.com	04/14/2019	3999347877uy@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	3999347877uy@ykkkkku.com	04/10/2019	3999347877uy@ykkkkku.com	COMPLETED	View
289914	3100000028-01	ADD_SERVICES	04/05/2019	3999347877uy@ykkkkku.com	04/05/2019	3999347877uy@ykkkkku.com	COMPLETED	View
289906	3100000028-01	ADD_SERVICES	04/05/2019	3999347877uy@ykkkkku.com	04/05/2019	3999347877uy@ykkkkku.com	OPEN	Edit Delete
289413	3100000028-01	ADD_SERVICES	04/03/2019	3999347877uy@ykkkkku.com	04/03/2019	3999347877uy@ykkkkku.com	COMPLETED	View
289346	3100000028-01	ADD_SERVICES	04/03/2019	3999347877uy@ykkkkku.com	04/05/2019	3999347877uy@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 ordernumber 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

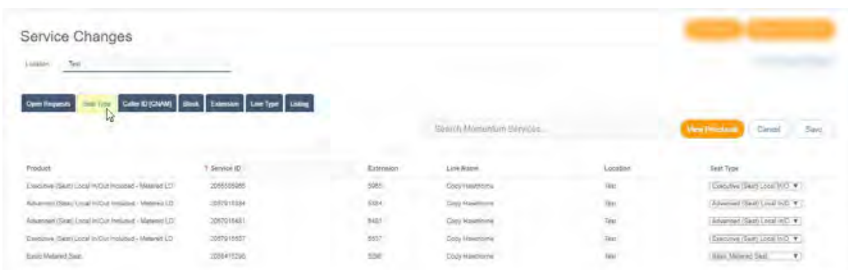
Use Caution: This action cannot be undone. This action is available to select when permissible within the process. Note: Completed orders cannot be deleted.

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 tools 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).

Caller ID (CNAM)

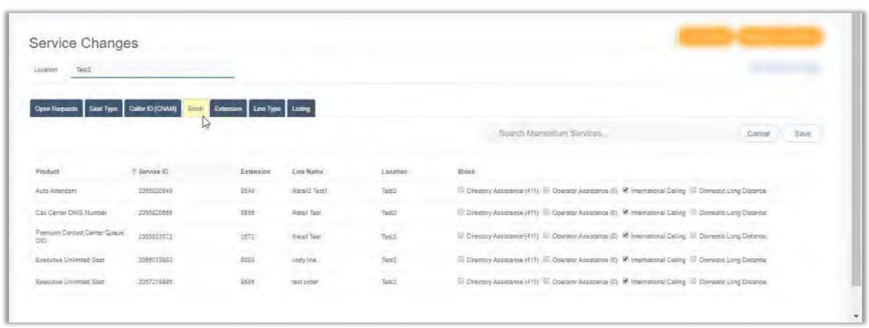
Manage/*change* the Caller ID to be displayed for lines in each location on the account. In this tab, Column headers may be used to sort the list alphanumerically. A section search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list 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

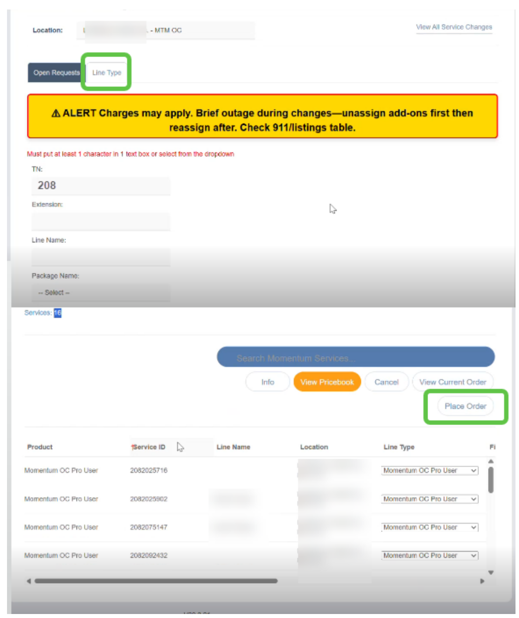
Manage/*change* extension assignments for lines in each location on the account. In this tab, a section search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line 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 whenever possible.
Always Remove All Add-Ons From Lines Before Attempting to Change.



1. While viewing Line Type, choose the Location (top of page
2. Enter search criteria or choose package type to view a list of any lines matching your criteria
3. Click the drop-down adjacent to a line in the list to change the Line type assignment.
4. Repeat to find and modify other line type assignments, as needed.
5. Click on the Place Order button when ready to submit the change for all lines you modified.

Once Submitted, Admins can review the Line Type change order information or Cancel the process in the Line type Open Requests Tab (while still processing) and in the View All Service Changes section.

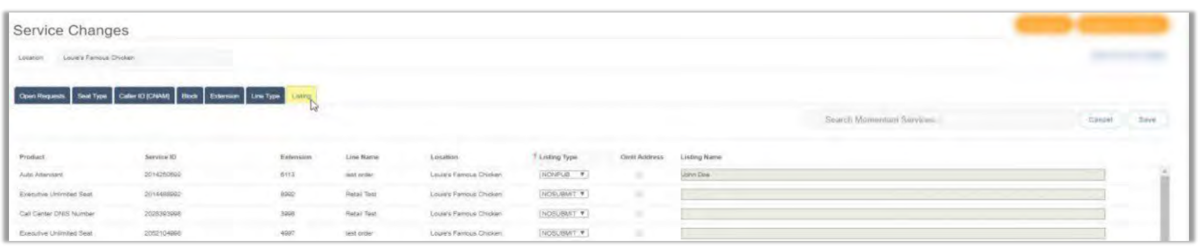
- Line Type: Select a new Line Type from the available options in the drop-down. The other listing fields also become available for edit.
  Note: If there are User Add-Ons assigned, the system notifies the user that they must be Un-assigned prior to a Line Type change.
- Listing Type: Select an option 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).

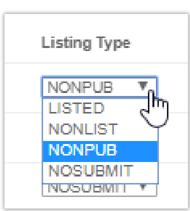
5. Click Save to submit the change(s) for processing - Or click Cancel and confirm to discard changes.

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 usable 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.



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:



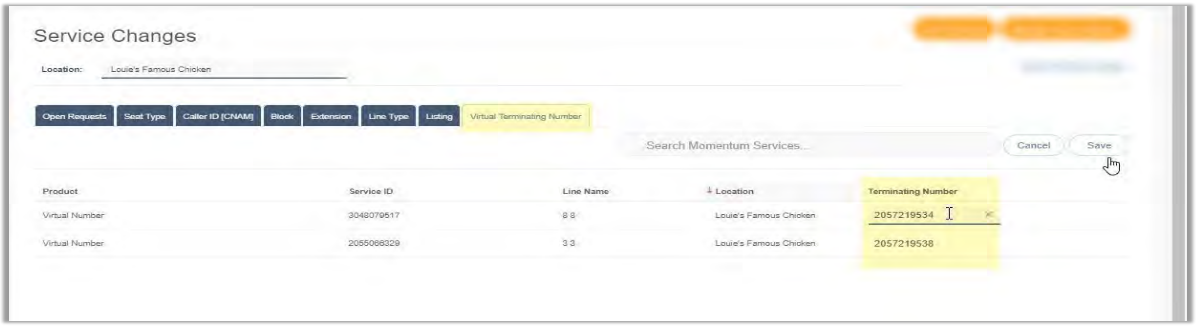
- LISTED – Select to enter information and list.
- NONLIST – Select to enter information but not include in directory listings.
- NONPUB – Select to enter information but not include for publishing.
- NOSUBMIT – *Default. Read-Only*. Select another Listing Type to make changes.

   - Omit Address: Click to place a check mark in the box to <u>omit</u> 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)

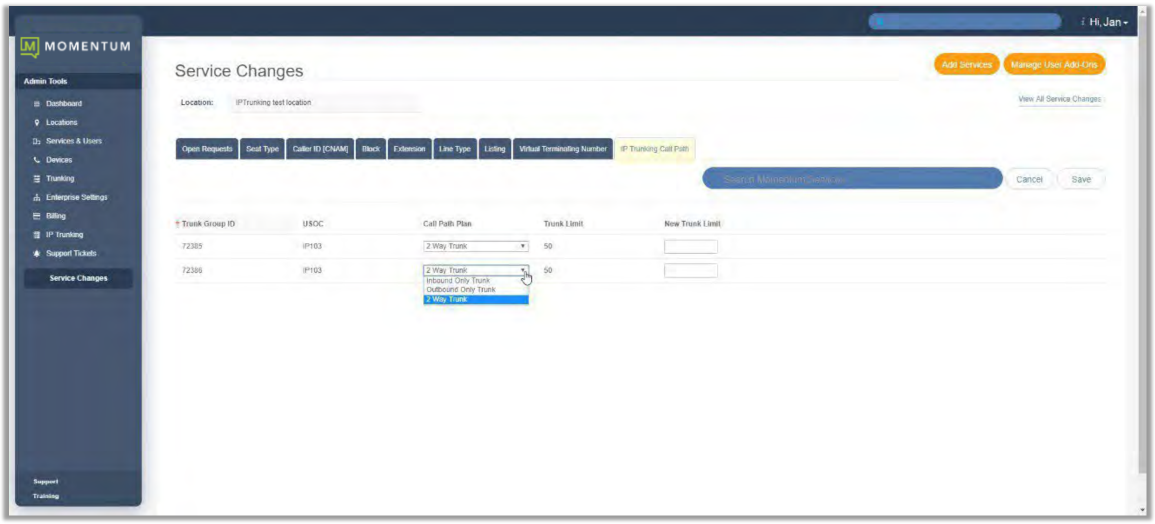


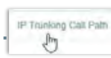
1. Click on the Virtual Terminating Number tab in the Service Changes page.
2. Select a Location from the drop-down list at the top of the page. *The list for the location displays.*
3. Identify the correct virtual number line within the table. *The Search tool and column headers are available to assist 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).

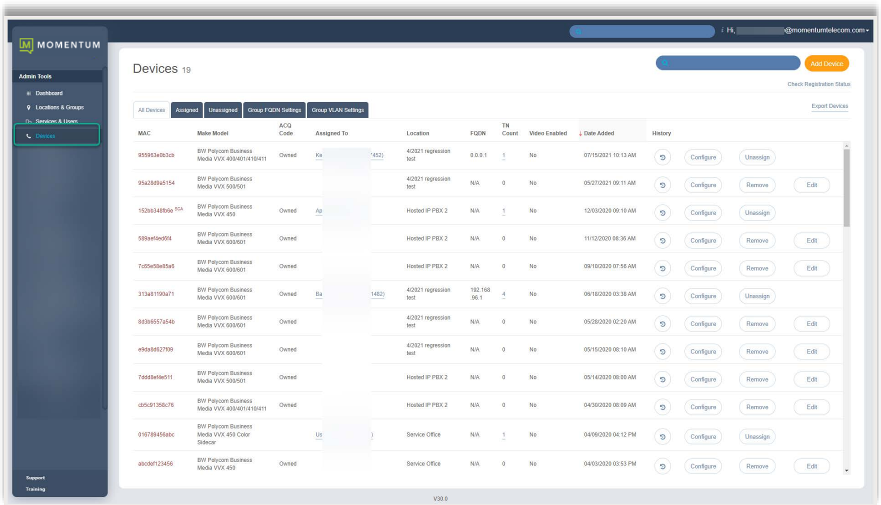
   The information for this change request may be reviewed in the Open Requests tab, and within the View All Service Changes page. The *History* of this service change activity may be reviewed in both of those pages, as well.

*DEVICES

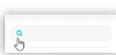
Restricted Access - Service Provider Level - Service Impacting

Specially authorized Administrators may be granted permission to work with some or all of these advanced tools.

The Devices section offers a searchable table list view of some types of devices in Momentum NEPs inventory, as well as individual lists of the Assigned and Unassigned devices. Devices will only display if they have been added into the inventory of relevant voice related accounts. Dependent on role, Admins may also be granted 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

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

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

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

Unassign

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

Remove

Remove

Delete unassigned devices from inventory.

Edit

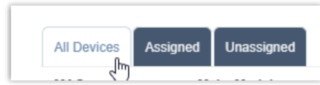
Edit

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.

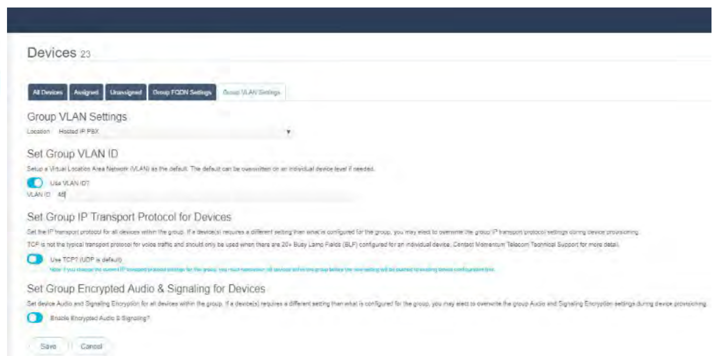
1. While in the Devices section, click on a tab at the top of the page to view related lists of devices in inventory (if any) and to access the inventory management tools for those devices.



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

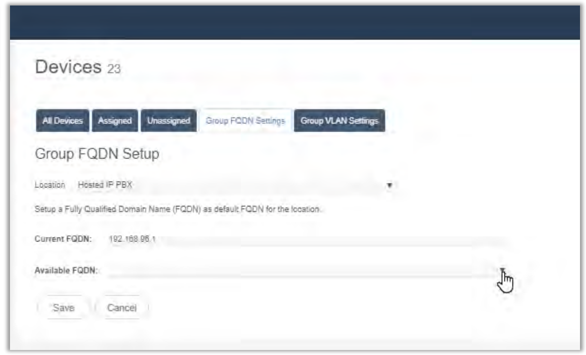
   Enable Encrypted Audio & Signaling? On/Off setting.

   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:

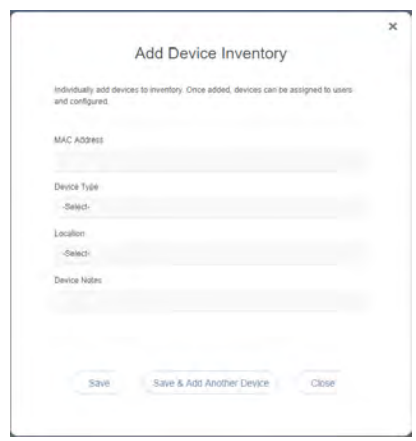


1. Click on the Group FQDN Settings Tab.
2. Location - Choose a location option from the drop-down menu list.
3. Current FQDN – Read Only. Displays the current default FQDN assignment.
4. Available FQDN – Click within the field to open the drop-down selection list and choose an option from the FQDNs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

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.

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.

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.

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.

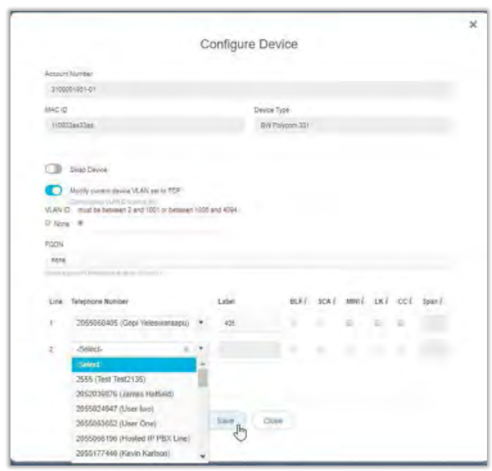
Check Registration Status

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.

Configure a Device

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.

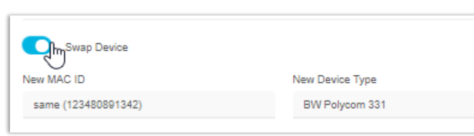


While working in Devices:

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

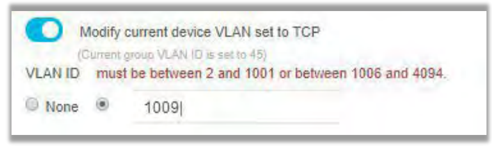
While working in Configure Device:



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:



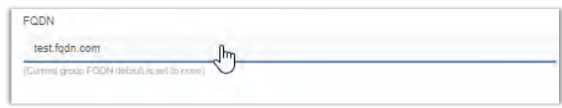
1. Click to toggle the switch to Enabled.
2. OR - Click the setting toggle to disabled
3. Click to set to None (default), or
4. Click to enable and Enter a VLAN ID in the field (must be between 2 and 1001 OR between 1006 and 4094).

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:

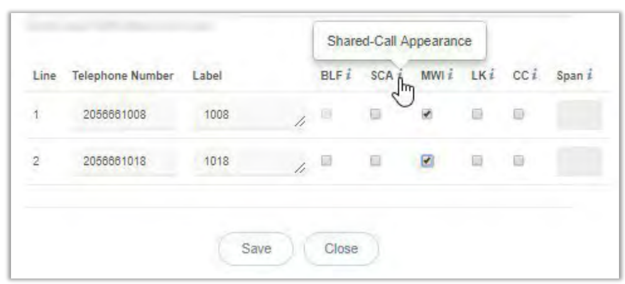


1. Click within the FQDN field to select from the available *Fully Qualified Domain Name* options in the drop-down list.
2. Click Save to update the information, OR – Click Close to exit the dialog without making changes.

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.

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:

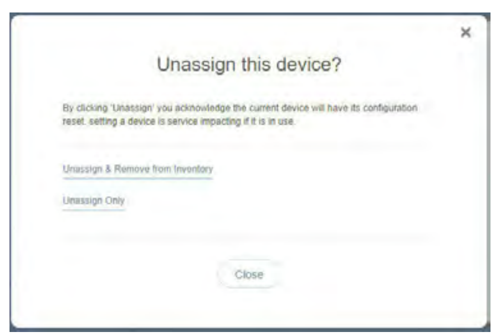
1. Select a device in the list.
2. Click on the adjacent Configure button for the listing.
3. Make any changes needed to device configuration.
4. Click Save to submit the new configuration data.
5. Click the Reboot Device button.

   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.

The additional tools include:

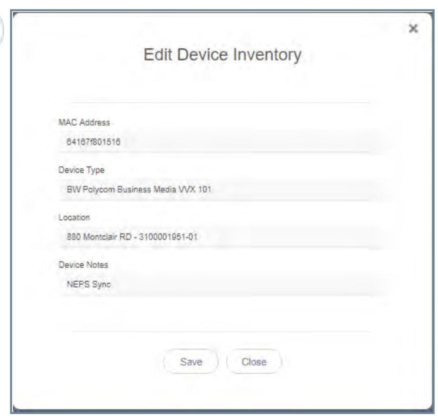
Edit – Select this button to edit the device inventory information before configuring and assigning it.

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:

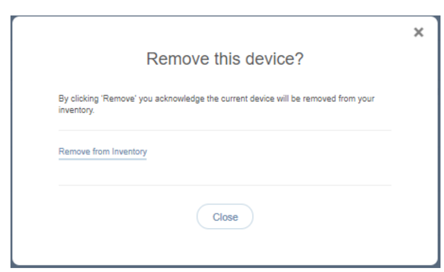


1. Select an Unassigned device in the list.
2. Click the Edit button adjacent to it to begin editing the inventory information.
3. Select or specify the following:
   - MAC Address – Enter or Edit the MAC Address. Correct formatting information is provided if data is entered in error.
   - Device Type – 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.
4. 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:



1. Select an Unassigned device in the list.
2. Click on the adjacent Remove button for the listing.
3. 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*

Advanced Permission Settings

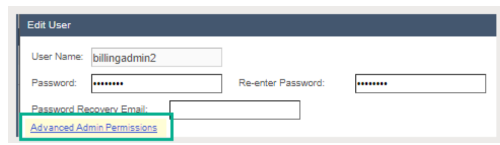
LIMITED ACCESS - SuperAdmin Only

CAUTION. Additional Administrator permissions (and often more training) are required for access to review and manage the information and tools within the provider-level restricted access sections. By default, most of those restricted area features are ***not*** enabled for use by *any organization* and the permissions to enable those restricted sections must be authorized and managed by the Service Provider. If any of those areas are enabled for use by the Service Provider, the organization's SuperAdmin must discuss the organization's responsibilities and liabilities for usage with their Service Provider contact (and potentially receive additional training) prior to attempting management of this additional access for their organization's Cloud Services Portal Admins. *Provider-level tool access and use can result in diminished support service levels and incorrect usage by your staff can create self-inflicted service losses or negative impacts to your business.*

Only the SuperAdmin should use these tools or grant access to their staff while working in Locations & Groups > Manage Users:

1. Locate the correct Portal account in the Manage Users list.

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



3. Click on the Advanced Permissions... link to review and edit the available *Advanced Permission* settings.

4. Choose the areas and relevant level of access to the provider-level restricted access tools and sections that if any are visible. Note, most of these will not be visible by default:

   Service Changes - (AKA MACD) If visible: Click within the listed check boxes to ☑ enable or ☐disable the appropriate Service Changes section and feature access level for this account holder. Use Caution. **Best Practice:** When in doubt, do not enable the ***Add*** access options for any Admins who should not have the ability to increase your organization's billing costs.

   Devices – If visible: Click within the listed check boxes to ☑ enable or ☐ disable appropriate administrative device management tool access in the restricted *Devices* section. **Use Caution**.

   Billing – (Access Restricted) Disabled by default for all but the SuperAdmin. Click within the adjacent check box to ☑ enable the selected Admin or User/TN account to view the Billing section, access invoice/statement documents, and manage bill payments for the account or any specifically assigned locations.

   Support Tickets – **Default Setting = NONE** for all accounts except the SuperAdmin. Other options are Read Only and FULL Access. Use Caution as access to these tools can be a security risk and those granted the ability to submit tickets (Full) must be authorized support contacts for your organization.

   - **NONE** is the default because the vast majority of portal account holders should not have access to review or submit tickets to the provider as a security precaution for all Organizations.
   - **Read-Only** authorization allows portal accounts with this permission level to view tickets submitted by those authorized to contact the Provider's Customer Service department on behalf of the Organization but cannot edit or submit tickets.
   - **Full** access allows the account holder to view and submit tickets to Customer Care. Please note, very few portal account holders should *ever* be granted **FULL** access and those who are must be authorized contacts in file with Customer Support..
     Best Practice: *Do not provide Full Access to any portal account holder that does not have the full authorization of your Organization to review all eligible support tickets for the organization, and who are not authorized to communicate with or make requests of the Service Provider on behalf of the Organization that could impact billing or service.*

5. Click the Save button to submit the changes and Save again in the *Edit User* view.
   Upon their next portal login, the restricted access section(s) or tools will display to that Admin per the level of access granted.

Contact Us

A team of expert support professionals are here to assist with technical issues, questions related to billing, feature usage, service upgrades, and any other general inquiries you may have. Simply contact us and a caring representative will help you with your request.

Support by Phone

General Line **888.538.3960**

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

Calling Customer Care directly is always the fastest way to get help when you need it.

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

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

Online Support

GoMomentum.com/support

Online options are provided to access Customer Support quickly and easily, including contact information and helpful tools to submit a support request ticket. For fast resolution, include the issue, details of your efforts to resolve (if any), methods to reproduce the issue, along with your account number and authorized contact information. Direct access from the Cloud Services Portal is available by clicking on the Support menu option.

User Resources

GoMomentum.com/MU

Momentum University is an online library of training and support resources that will equip you with all you need to learn about Momentum's best-in-class cloud services and their features. This library includes continuously updated product user guides, quick reference tools, tips, videos, and more - and it is always available for customers to reference on the Momentum Telecom website 24/7/365 for training when you need it. Direct access from the Cloud Services Portal is found by clicking on the Training menu options.

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