SIGN IN

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

ADMIN TOOLS MENU

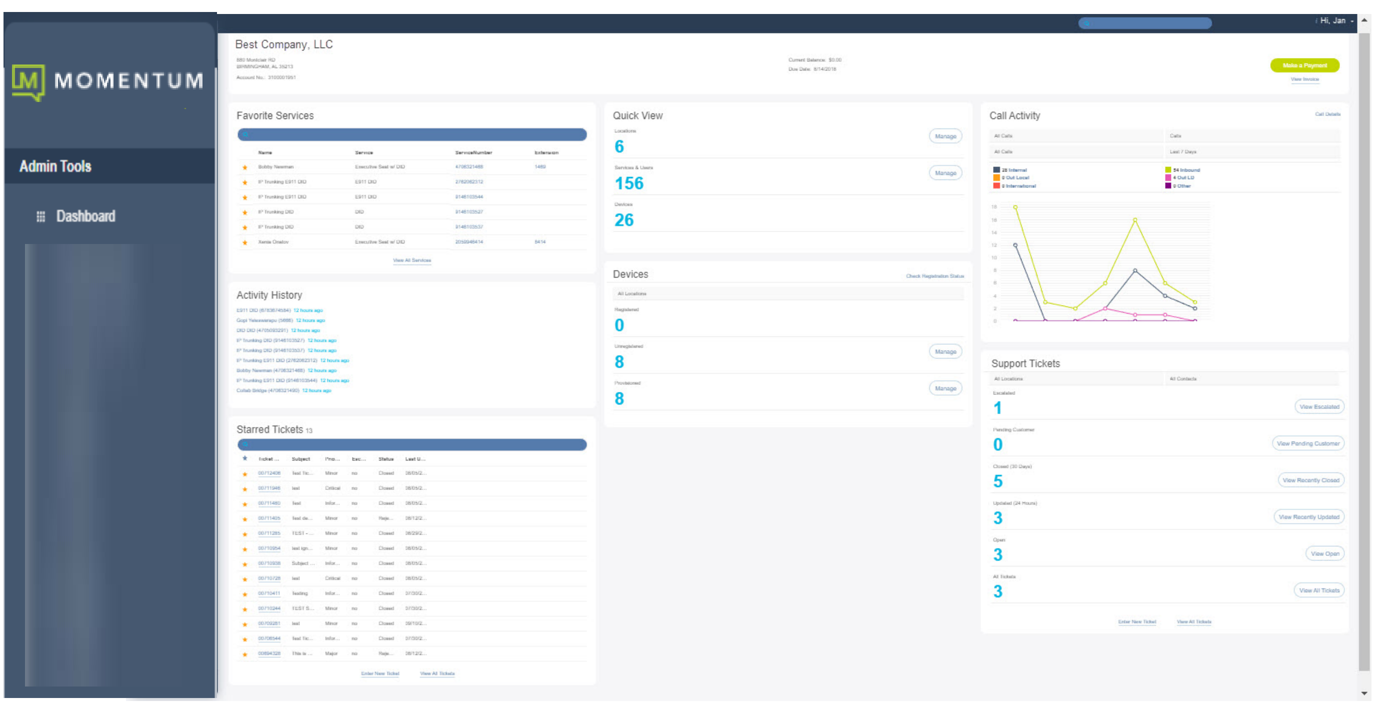
The Admin Tools Menu on the left side of the page offers permission-based access to at least some of the following sections. **Note**: Only those sections and tools the organization needs and the Admin is authorized to view will display.

- Dashboard - The home page for Administrators offers useful information and filtered access to useful sections of the Cloud Services Portal
- Locations & Groups - Manage Location and Group level features and settings
- Services & Users - Review User / Service Account list and access to manage individual user/account settings
- Trunking | *IP Trunking | *Enterprise Trunking - Review and manage basic or specialized trunking settings based on the organization's setup
- Enterprise Settings - Manage enterprise-level services and features
- *Contact Center - Contact Center customers. Administer Contact Center setup
- *Microsoft | OC Teams - Teams Admin access only. Advanced Teams initial deployment and User TN / Routing assignment management tools
- *Call Recording - Call Recording customers only. Manage basic Broadsoft voice settings and site access for Call Recording license holders
- *Webex - Webex customers only. Search for and review the self-activation process status for users who are assigned Webex licenses
- *Circuits | *Service Locations | *Circuit Devices - For data/managed network customers only. Review circuit performance metrics and information
- *Support Tickets - Limited Access - Permissions/authorization required to work with the tools to communicate with Customer Support
- *Billing - Restricted Access. Advanced Billing information review and payment management tools
- *Manage MFA - Review assigned user MFA activation status and Reset MFA to assist users with MFA-related access issues

ADMIN DASHBOARD

The Home page for Administrators.

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

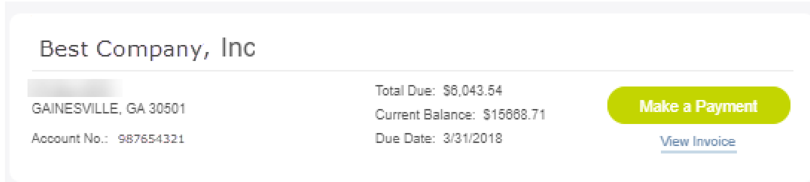


VOICE ADMIN DASHBOARD FEATURES

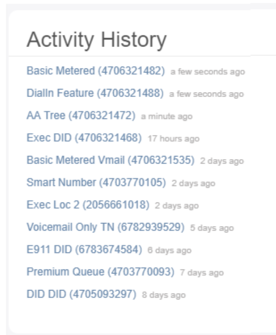
The Dashboard section cards offer LIVE and historical data along with easy access to common administration tools. All Dashboard features and portal sections require sufficient authorization or permission to view and use.

Account Profile - Review current account information. Billing Admins can see the latest invoice, pay the current bill, and access the Billing history. *Admins without Billing access permissions will only see the Profile information in this section.*

Links to: Billing

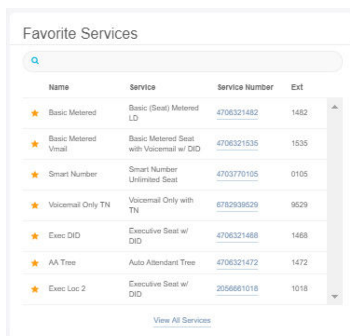


Call Activity - A quick graphical view of call data, with tools to filter the view, useful 'mouse-over' details within the graph display, and access to open and filter your call logs for reporting.



Activity History - Shows recent Administrator-level activities and provides quick access links to review the account or service shown in the list.

Links to: Direct links to Dashboard of the accounts or services listed here.

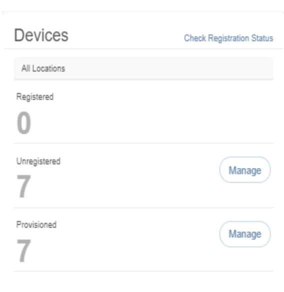


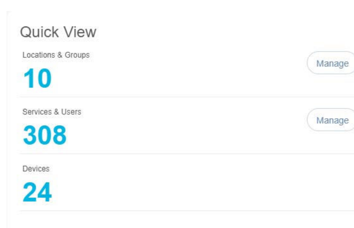
Favorite Services - Locate accounts to set as favorites ★ for constant quick Dashboard access.

Links to: The Services & Users page and to the selected User's Dashboard for account management.

Devices - Current counts for registered, unassigned, and provisioned devices, and the ability to filter by Location, check registration status, and access device assignments.

Links to: Services & Users

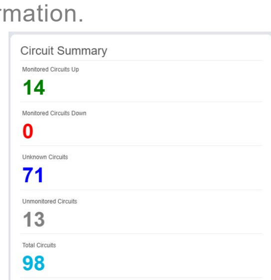


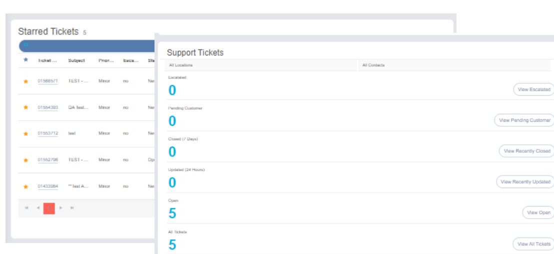


Quick View - Total number of Locations & Groups, Services & Users, and Devices. Information is based on the Admin's access permissions.

Links to: Filtered views of Locations & Groups and Services & Users

Circuit Summary - This widget offers a heads-up view of current circuit information.





Support Tickets & Starred Tickets - These two optional dashboard cards only display to authorized Admins and offer quick views for submitted support ticket information, and access to the Support Tickets section to view more details.

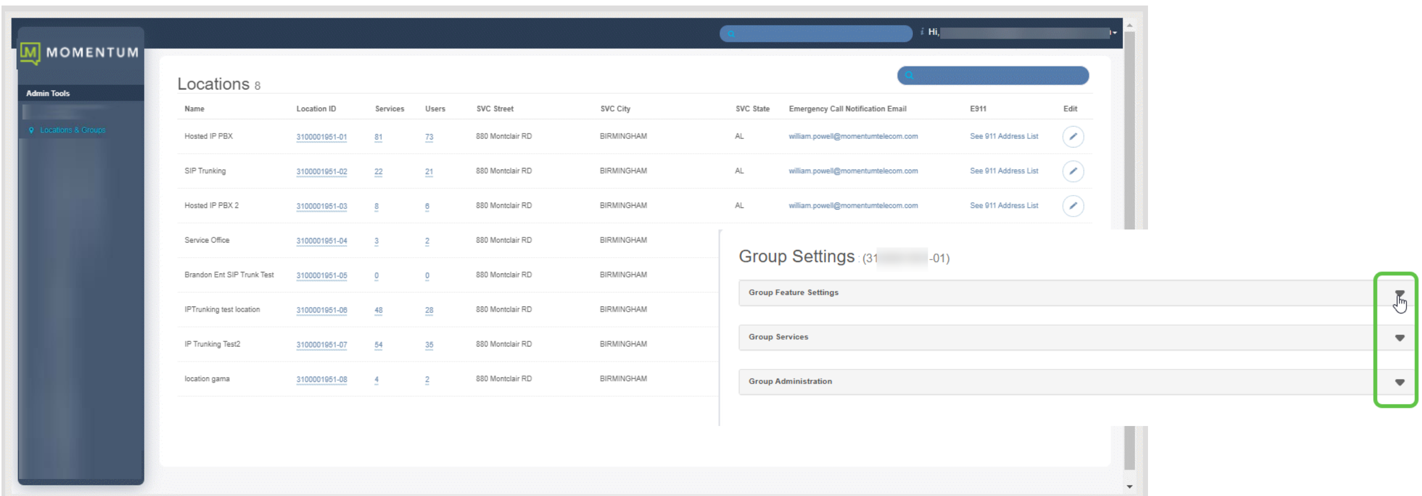
Note: Some dashboard sections may display information or tools for optional or advanced permissions sections of the Cloud Services Portal ONLY if the Administrator has been granted sufficient access permissions for any of those areas.

LOCATIONS & GROUPS

Review and manage settings for the Users and Groups that are assigned to Locations.

The Locations page provides a searchable table listing of the Locations currently configured on the account. Authorized Admins may use the Section Search to locate specific terms within the table, use the column headers to sort the list alphanumerically, and access the following areas for each Location listed on the page:

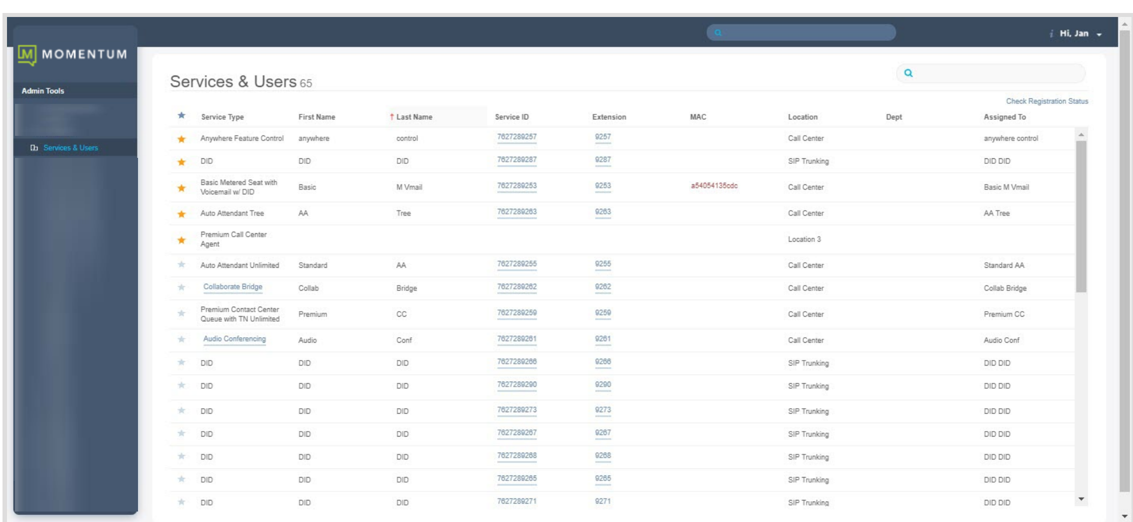
- Location ID, Services, and Users - Click on the number displayed for a Location in these columns to open the related list within the ***Services & Users*** page.
- Links to review and manage the Emergency Call Notification Email and See 911 Address List for each location.
- Edit icon (far right column) opens the ***Group Settings*** dialog for the selected Location.



SERVICES & USERS

Review and manage feature settings for individual users and services on the account.

Services & Users displays a searchable and sortable list of the user accounts currently defined on the account. The information is provided in a simple table format, and includes the Service Type, Name (First,Last), Service ID, Ext(ension), MAC (Address), Location, Department and Number Assignment for each user, where defined. Links in the columns take users directly to the related area of the site where editing or review of filtered data may be performed. Admins may also select specific listings to display as Favorites ★ on the Dashboard for quick access to accounts that they manage frequently.

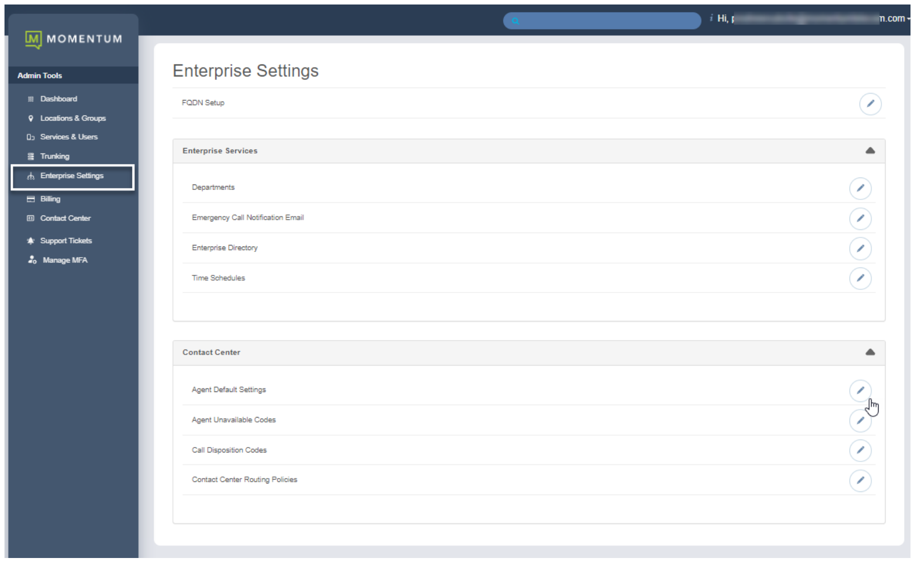


ENTERPRISE SETTINGS

Manage the Enterprise (global) level settings and features.

The **Enterprise Settings** menu option opens the ***Enterprise*** (global) level default feature settings for review and edit. These may include the Global Enterprise Services settings (Departments, Directory, and Time Schedules), and the Global Contact Center settings (Agents, Unavailable Codes, Disposition Codes and Routing Policies).

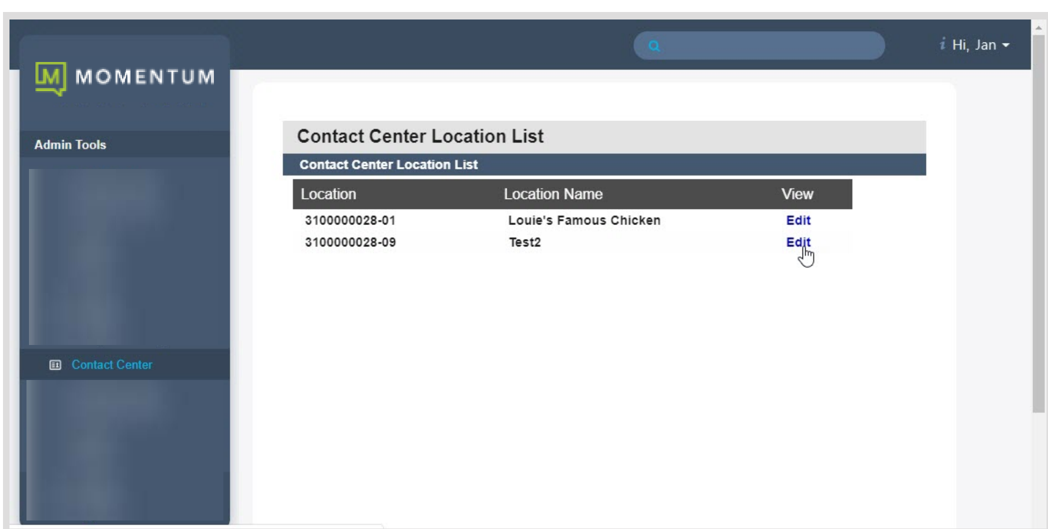
- View/Edit The drop down arrow ▶ next to an item opens the *Edit Settings* view.



CONTACT CENTER

Contact Center management tools for activation, setup, and feature configurations.

The **Contact Center** page provides authorized Admins with full access to manage their Contact Center feature configurations and overall settings. This section shows the current Status, Name, Type, Phone Number, and Ext(ension) within a searchable list. Each Contact Center listing offers access to **Edit** its default setup and **Configure** individual feature settings.

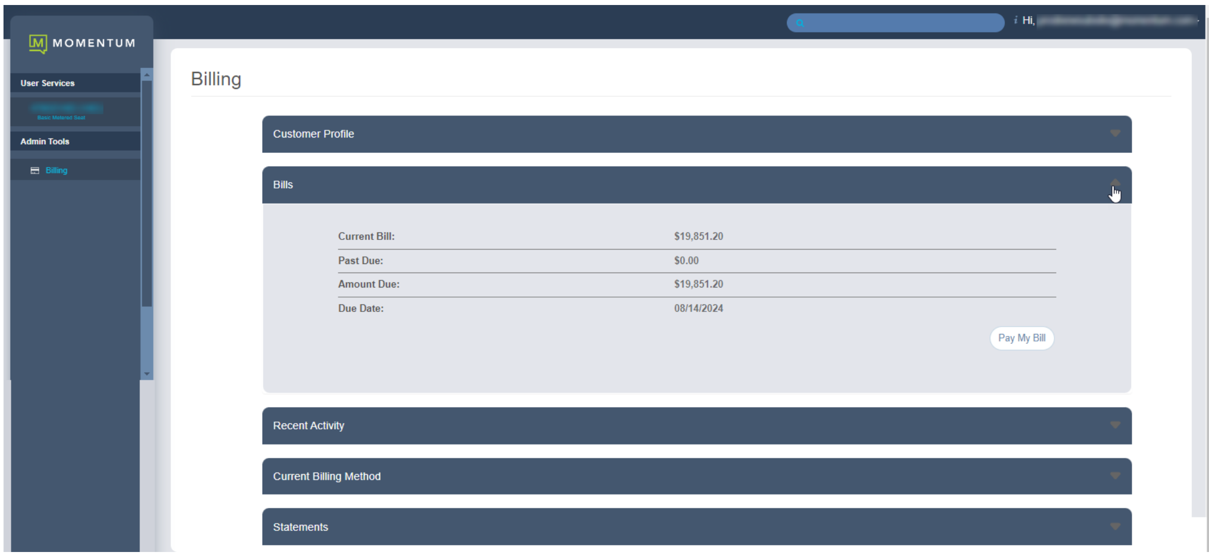


*BILLING

Restricted Access. Authorized Admins may review and manage account billing information and payments.

The **Billing** page displays current account and balance history information (at the Enterprise or - where enabled - at the Location level, with easy access to the tools that allow Admins to review and manage statements, edit the billing payment method information, setup routine monthly payment schedules, and even immediately pay the current bill when necessary. Billing tools include:

Pay My Bill • Billing Method Setup • View Statements

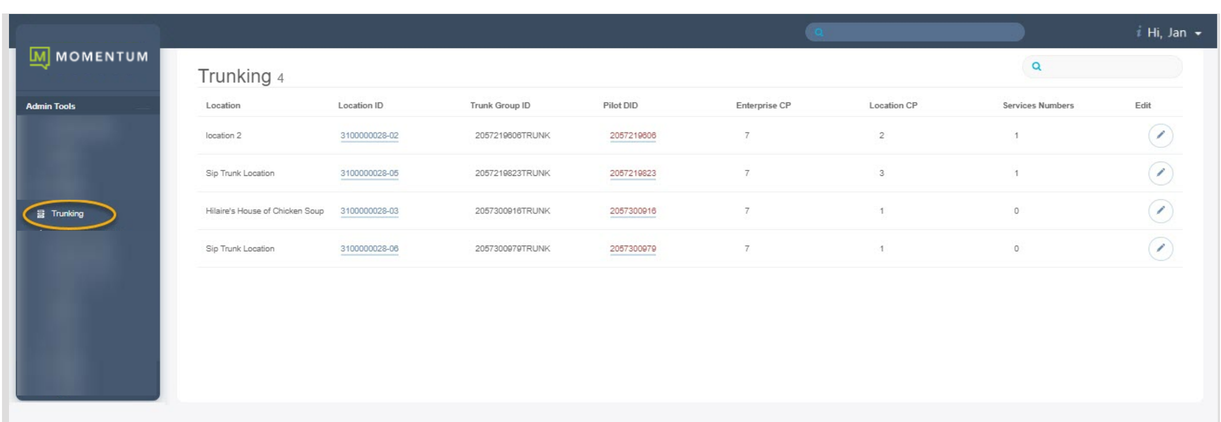


TRUNKING

Access for IT Admins to review and manage basic SIP Trunking settings.

The Trunking page allows authorized Admins to review current SIP Trunk settings for the account. The page prominently displays a sortable and searchable table listing the trunk group(s) with Location Name and ID, Trunk Group ID, Pilot DID, Enterprise Call Path, Location Call Path, and Service Number.

- Location ID - Links directly to the ***Services & Users*** page to review or modify individual assignments.
- Pilot DID - Provides a color code health indicator (Red = Issue) and links directly to the ***Services*** dashboard.
- Edit - The Edit icon opens the ***Group Settings*** page for administration of the SIP Trunk defaults.

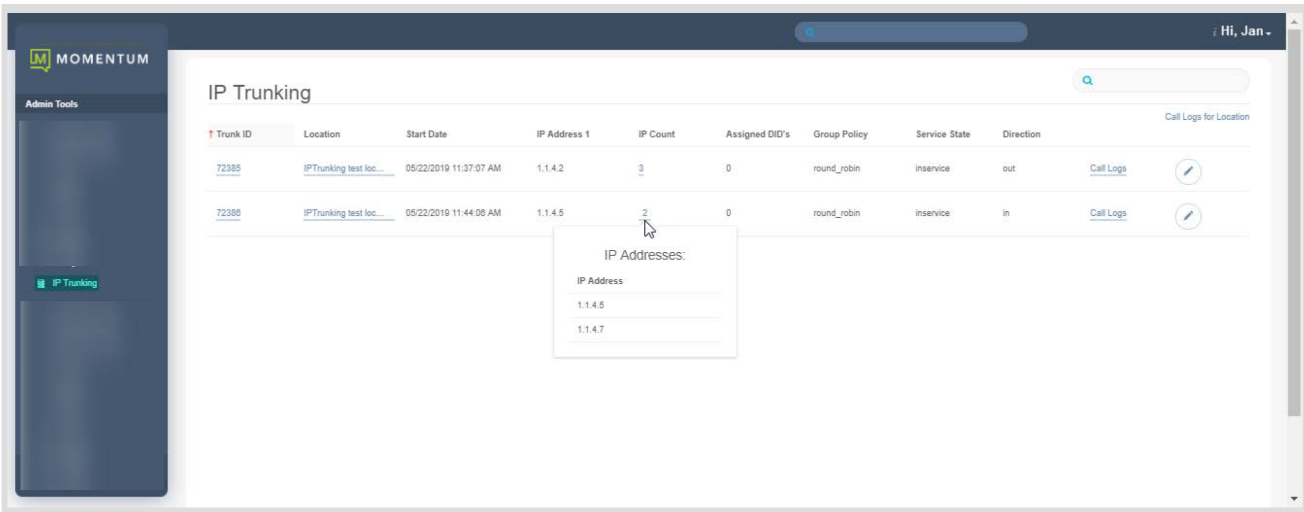


IP TRUNKING

Advanced Access for IT Admins. Review and manage specialized IP Trunking information and settings.

For those organizations using **IP Trunking**, this page displays current and historical IP Trunking information, with easy access to the tools that allow authorized Administrators to manage IP Trunking location settings and create call log reports. IP Trunking tools include:

View/Edit Trunking Location Settings • View Call Logs • Create Call Log Reports

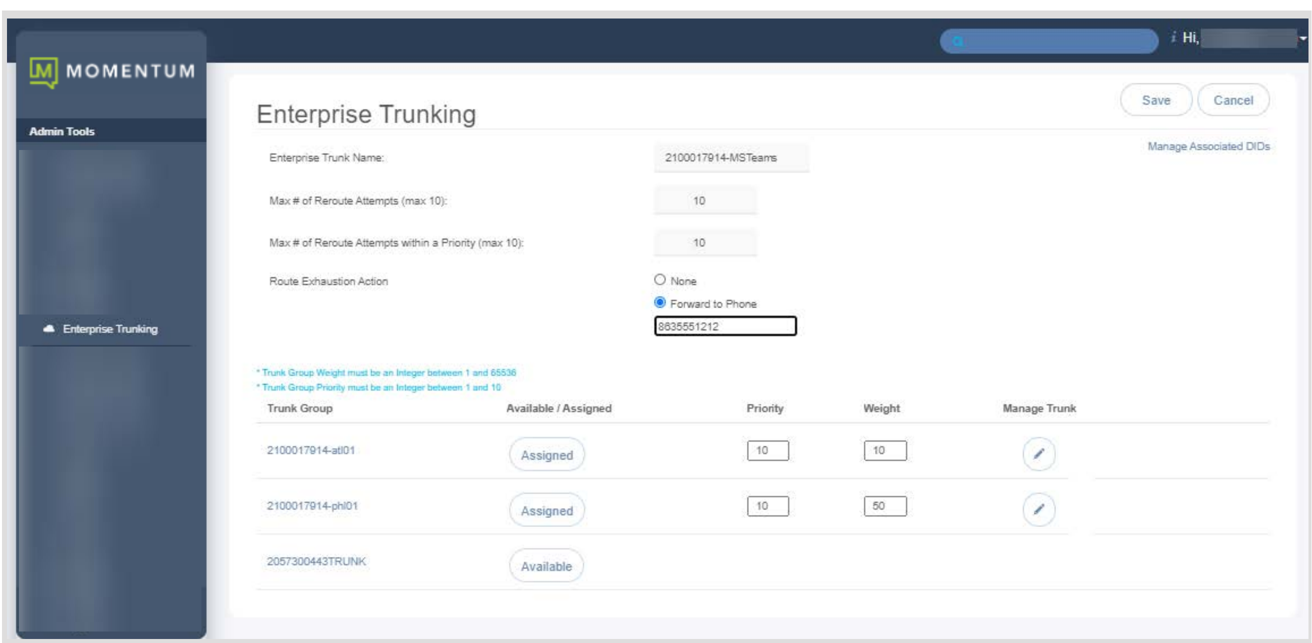


ENTERPRISE TRUNKING

Advanced Access for IT Admins. Review and manage Enterprise SIP Trunking settings for the account.

The **Enterprise Trunking** page provides access to the tools that allow specially trained and authorized Admins to manage and maintain specialized Enterprise trunk group settings.

View/Edit Trunk Group Settings • Manage DID Associations • Manage Routing/Priority/Weight

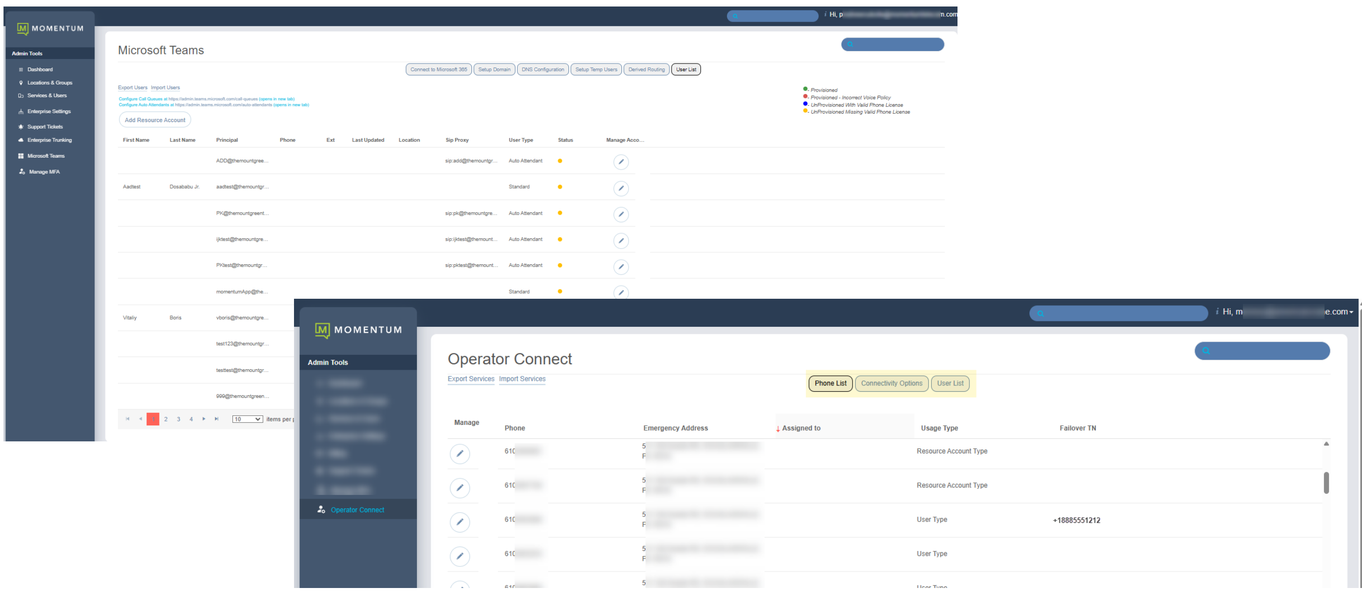


TEAMS (MS or OC)

Important: Restrict Access to your O365/MS Teams Administrators Only.

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

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

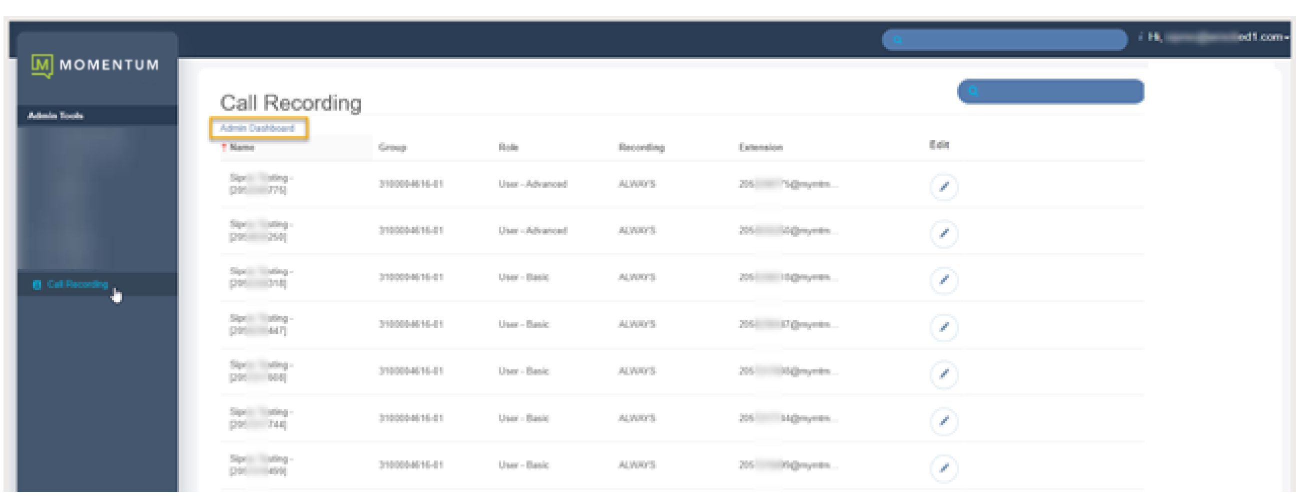


CALL RECORDING

Access to review and manage Broadsoft Call Recording license holder voice settings and site access.

This section only displays in Admin Tools for those organizations with Call Recording licenses in place, and offers access to manage voice and 3rd party portal access settings for license holders.

View License Holders • Manage Call Recording Voice Settings • Manage Call Recording Site Access

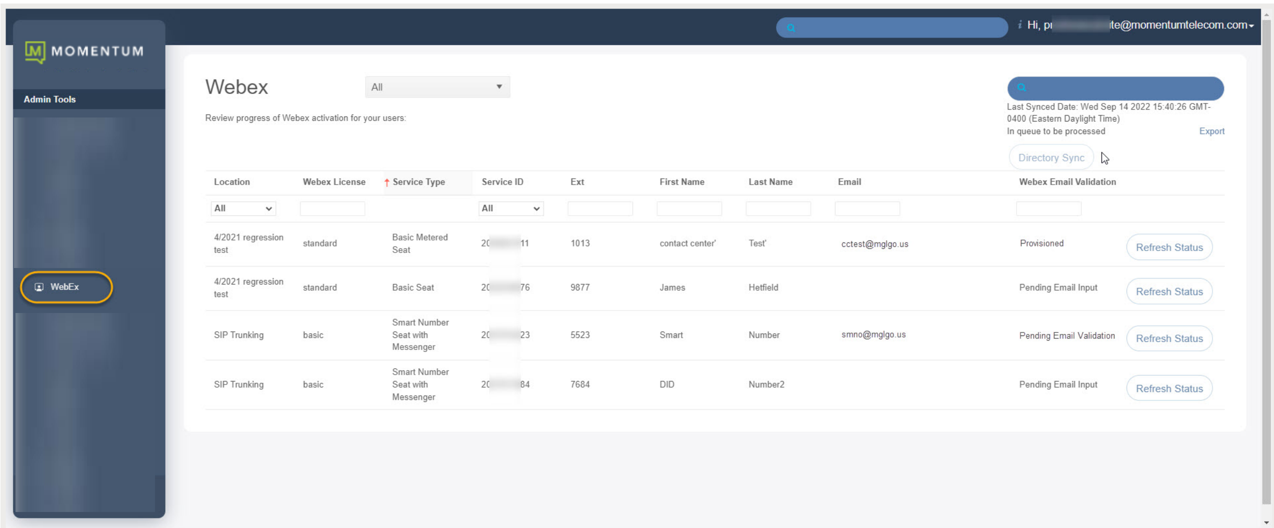


WEBEX

Limited Access section for accounts with Webex application licenses Only.

The Webex section displays only if Webex licenses have been purchased for users on the account and should be viewed only by authorized Administrators. The Webex page provides a searchable list of the Webex users currently licensed on the account and their current activation process status.

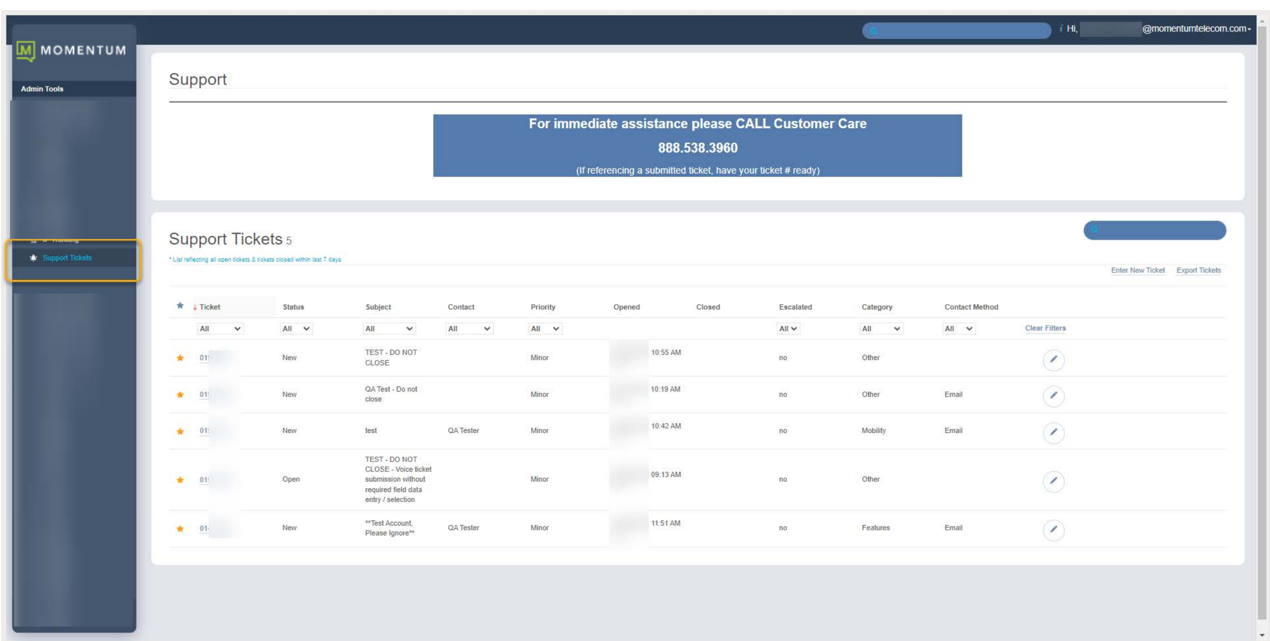
Search Table Contents • Filter by Activation Status • Sort Columns • Refresh Status for Updates • Directory Sync



*SUPPORT TICKETS

Limited Access / Advanced Permissions required section.

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

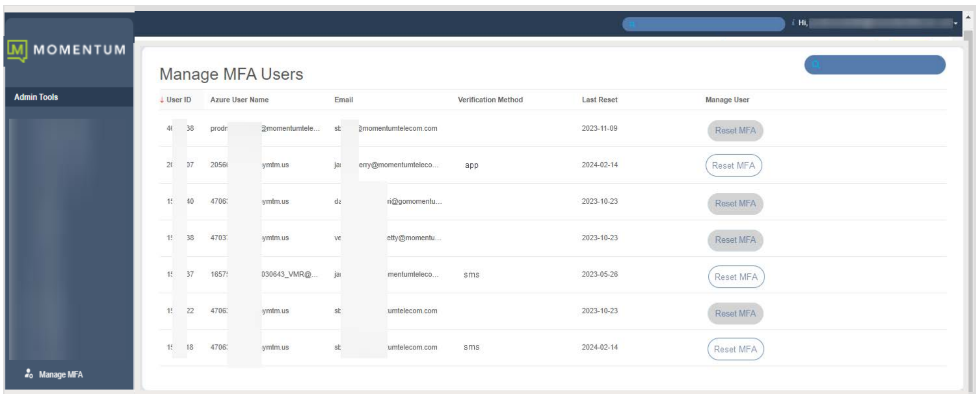


*MANAGE MFA

Data shown in this section is permission-based.

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

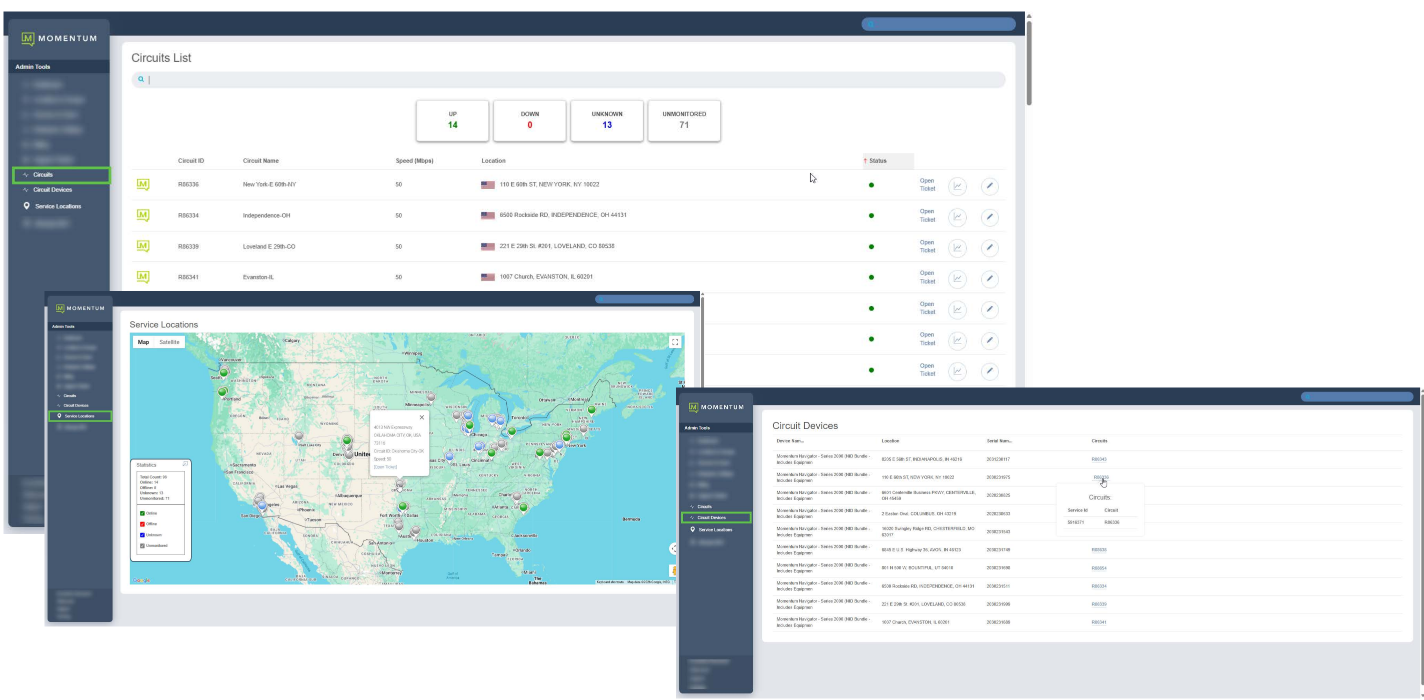
Note: *Only the Portal Account Holder can set up the Multi-Factor Authentication protocol they'll use to log into their account.*



*CIRCUITS | *SERVICE LOCATIONS | *CIRCUIT DEVICES

Data/Managed Network Customers ONLY.

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

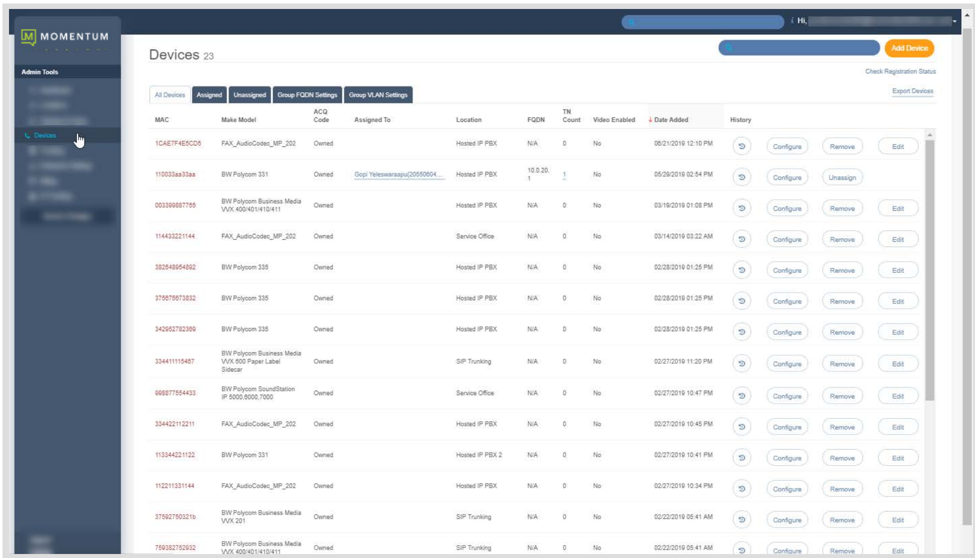


*DEVICES

Restricted - Service Provider Level. Support/SLA Impacting. Advanced additional training required prior to access.

Review and manage devices in NEPS inventory, along with their settings and assignments.

The Devices section offers access to a searchable view of All, Assigned, and Unassigned Devices for management, with the ability to Export a detailed device listing report, and add new devices to inventory, and manage FQDN and VLAN assignments for Locations on the account. The device management tools provided here make it easy to Add new devices to inventory, Configure, Swap and Assign listed devices, Remove device assignments, Delete devices from inventory, and review the historical activity of actions performed on each device within the Portal.



*SERVICE CHANGES

Restricted Access - Service Provider Level. Support & Billing Impacting.

Perform some simple single-process and automated changes to services or lines on the account.

The **Service Changes** page displays current account service orders, with easy access to the tools that allow specially trained/authorized Admins to modify many (but not all) account services, and review proces status data.