Business Voice

Cloud

Administrator Portal

User Guide

Contents

Introduction

This guide is a convenient, go-to resource for Administrators getting started with the Logix Cloud Services Portal to manage communications accounts and services online. It provides an overview of the application website sections that may be available to various users who access the Portal, and offers instructions and tips for setup and maintenance of the communication features and services offered by your telecommunications provider.

We encourage you to take some time to review this document and keep it handy for future reference. Should you need further assistance, please reach out to us. We are always here to help you with fast, courteous, and professional support, and we offer free additional training upon request.

It is important to note that this document describes all features that *can* be enabled and made available by the provider or the organization. Some features described here may not be included in your subscription or offered to all users by your organization. Please contact your organization's Communications Administrator to determine the features and services you will have access to review and manage within the Logix Cloud Services Portal.

IMPORTANT!

The Cloud Services Portal is a permission-based application.
The application provider defines the initial activation and service level of the portal for all end users. This includes the sections that will be made available to users working within it, and any customizations to the style or branding. Super Administrator access to work in the *Realtime Provisioning Explorer* (RPX) application is required to complete these activation and customization tasks.

Contact this application's provider for assistance or more information.

Portal Access

Logix offers an intuitive online Cloud Services Portal that makes it easy for Admins to manage enterprise and subscriber account features and settings online. Although it is currently *optimized for desktop usage*, the portal *is* accessible from any Internet-enabled device – even tablets or smartphones – so you can manage your services, whether you are in the office or on the go. In most cases, your Admin sign in credentials will be sent via email.

Your Initial LOGIN information will be emailed to you prior to your conversion .
Please contact your install coordinator, or customer service for you credentials.

Direct Online Access

1. Open a web browser and enter the URL (web address) provided to you for online account management.
   Example: https://myphone2.mylogix.com/

2. Enter the Admin Account Username

   - If you forget your password hit the link to retrieve your portal sign in credentials whenever necessary.

3. Click the Sign In button and Cloud Services Portal opens.
   Once you have signed into the Cloud Services Portal, the tools and features you need to easily manage your communications and account setup are right at your fingertips.

Access Via RPX

(Restricted) Once the Cloud Services Portal access is enabled for an organization, authorized Administrators with RPX access may view and manage the features and services provided to the account from the new Subscriber Portal **Emulation** functionality within RPX. This is similar to the emulation functionality provided by RPX for previous subscriber portal iterations.

1. Log into the Beta Realtime Provisioning Explorer (**RPX**) application.
2. Locate and select the customer account location or group.
3. Click on the S (Services) icon or go to the Services tab.
4. Click on the group link for an Admin user in the *Subscriber Portal (New)* column.
   The Logix Portal instance opens directly into the **Locations** Settings view for the group or Enterprise and offers access to the other Administration Tools areas within the portal via the menu on the left.

Admin Tools

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

When Administrators log into the portal, they see the Admin Tools section of the Menu Panel which provides authorized users with access to manage the organizational settings and services, as well as locate and manage individual accounts within the organization.

Security Note: *Once logged in, the connection will automatically close if left idle for an extended period. The system first prompts the user to continue working or log out, and then offers a countdown period prior to automatically closing and returning to the Sign In page.*

The Admin Tools navigation menu is permission-based, and can provide access to any or all of the following sections, if they are in use for the organization or enabled for the Admin:

- Dashboard – The home page for Administrators that provides access to key information, features, and the areas each Admin is authorized to manage within the portal
- Locations – Location and Group level setting management
- Services & Users – User Account list and access to manage individual user service settings
- Devices – Review and manage device inventory on the account
- Trunking – Review and manage SIP Trunk settings
- Enterprise Settings – Manager enterprise-level services and settings
- Contact Center – Administer contact center settings and configurations
- Service Changes – Advanced service change and order management tools only displayed to specially trained Administrators

Your role and authorization level determine the sections and features you may view and manage.

Each menu option opens the main page to begin working with the related settings or services, when those are included on the account. Only the options and services the Admin is authorized to view by the organization or provider will be available for review within the portal.

Dashboard

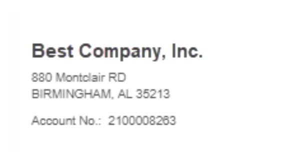
The Dashboard is the Home page for Admins. It provides at-a-glance information about the activity of the accounts and services the Admin may view, site-wide search functionality, and quick access to all of the work areas the Admin needs within the portal.

Admin Dashboard Sections

Each section widget (card) featured within the Admin Dashboard provides useful information, tools, and quick access links to relevant work areas.

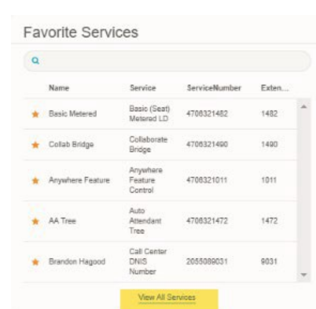
Profile

This card at the top of the Dashboard offers the basic account information as a reference.



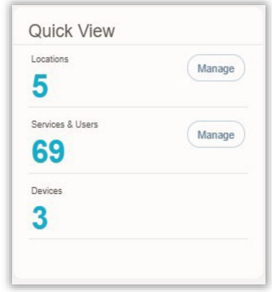
Favorite Services

A list of the service and user accounts that the Admin includes in their Favorites list (stars★) with quick links to access those accounts from the dashboard for routine management tasks. The View All Services link opens the Services & Users page for review.



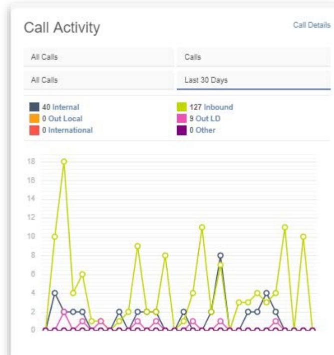
Quick View

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



Call Activity

This section provides a quick graphical view of call data, with filtering tools to select alternate call data for review by location, call type, time-frame, etc. This card offers useful 'mouse-over' details of the statistics within the dashboard view and a Call Details link to review filterable call log data and export call logs to a spreadsheet format for reporting.

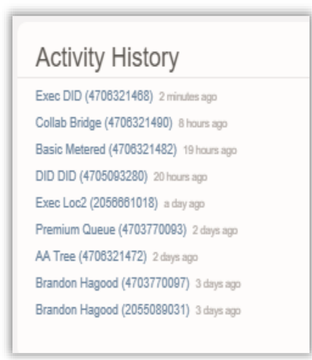


Devices

The Devices card displays the current counts for NEPS and BroadSoft registered and/or provisioned devices in inventory, with access to filter the information per [Location](), check registration status information, and *Manage* the *Registered*, *Unregistered* or *Provisioned* Devices assigned to selected Locations/Groups

Activity History

This dashboard section shows the times of the most recent Administrator-level activity on the system (that the admin may access), and provides direct access links to the [User Services Dashboard]() of each account displayed in the list.



Locations

The Locations page provides a searchable list of the Locations (Groups) currently configured on the account. Authorized Admins may search for terms within the list, use the column headers to sort the data alphanumerically, edit features the Group uses, and export a detailed location list to a .csv format report.

Section Search

Enter terms to locate data specific to the Locations section.

Column Links

The links in the Location ID, Services, and Users columns open filtered lists within the Services & Users page for review and maintenance of related assignments.

The Edit icon for each Location opens the Group Settings page for Feature maintenance and administration tasks.

Access Group Settings by Location

The Locations page provides easy access to manage the group settings by Location. If there are multiple locations or groups, this page provides the primary information for each within a searchable and filterable list and the ability to manage individual group/location settings and services via the adjacent Edit icon.

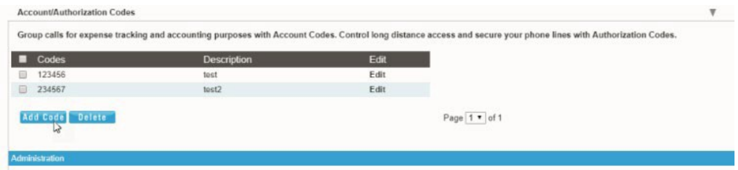
1. Click on the Edit icon adjacent to a Location (far right column) to open the Location's Group Settings dialog. Any features or services the Group uses are displayed for management in this page.
2. Click on the ▶ arrow under the View/Edit column adjacent to a setting in the list to open its *Edit*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

Location/Group features often include at least some of the following setting options:

Account / Authorization Codes

Manage setup and usage of Account and Authorization Codes. Only one type of code may be used at a time for your Location. Basic Instructions for setup are provided via the *See Instructions* link.

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



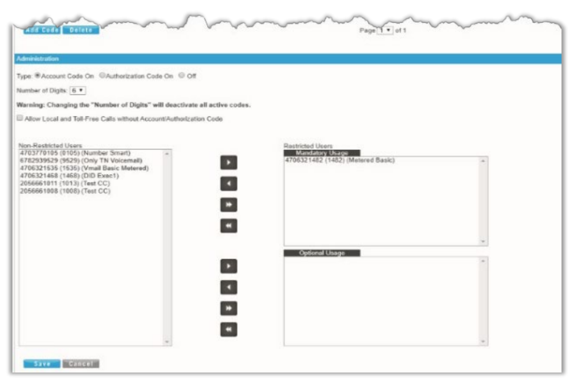
Add an Account or Authorization Code

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

Account / Authorization Code Administration

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

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



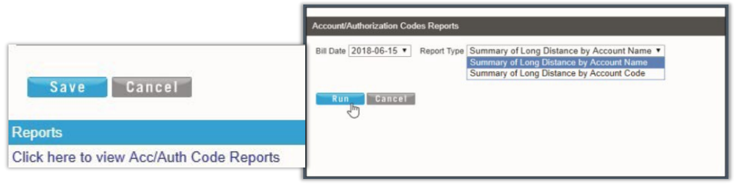
Edit an Account / Authorization Code

A. Click within the checkbox ☑ next to a code to enable or disable the code and click Save within the Code list section to update the system.

B. Click on the Edit link next to a Code in the list to change the name or code numbers and click the Save buttons in each area to submit the changes.

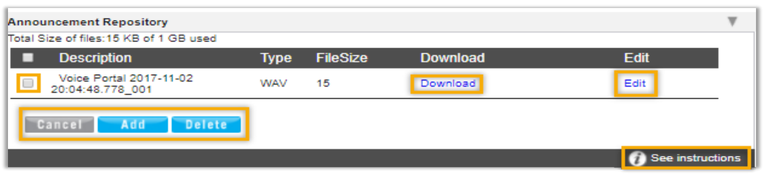
View Account / Authorization Code Reports

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



Announcement Repository

Manage the announcements and greetings that are available for selection by the group. This feature offers the ability to upload and store announcements and messages. Files uploaded and stored in the group Announcement Repository are available within selection lists when setting up Voicemail greetings and announcement messages. Basic Instructions and file size requirements are provided via the See Instructions link in the Edit view. While in the Settings page, click the adjacent ► arrow under View/Edit to open the Edit view.



The repository offers up to 1 GB of storage space. The total amount of storage that has been used displays for review. Maximum file size for audio announcements is 5 MB in CCIT u-Law 8kHz, 8-bit Mono format.

Add an Announcement File

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

Download an Announcement File

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

Edit an Announcement File

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

Delete an Announcement File

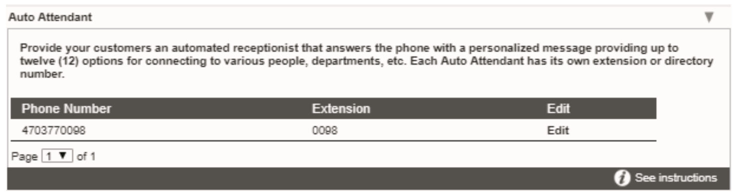
Caution: This action is immediate and cannot be undone.

1. Click to place a check ☑ in the box next to an Announcement.
2. Click on the Delete button. The removal action is immediate.

Auto Attendant

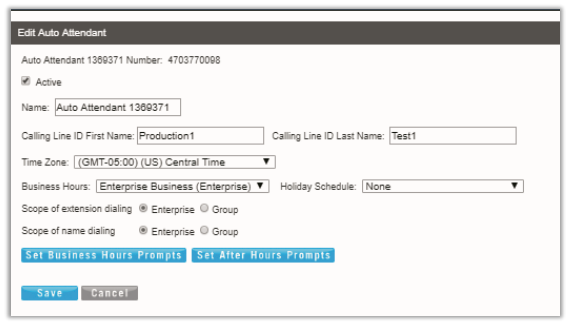
Manage the basic settings for the automated receptionist line(s) that answer the phone with a personalized message. Each Auto Attendant offers up to twelve (12) options for connecting to various people, departments, etc., and will be assigned its own extension or directory number. Basic instructions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

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



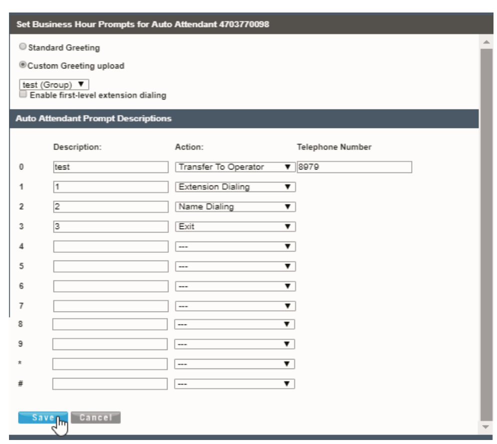
Edit Auto Attendant Basic Settings

1. Click on the Edit link next to the Auto Attendant listing to review the current settings.
2. Make the following changes, *as needed*:
   - Active: Click within the checkbox to set to ☑ Active or to ☐ disable the Auto Attendant.
   - Name: Type a name that displays in lists.
   - Calling Line ID First Name / Last Name: Type the name that will show on Caller ID for this Auto Attendant
   - Time Zone: Select the appropriate time zone where the Auto Attendant (or Location/Group) resides.
   - Business Hours: Select the Appropriate option from the drop-down menu.
   - Holiday Schedule: Select the Appropriate option from the drop-down menu.
   - Scope of extension dialing: Select ⦿ Enterprise or ⦿ Group.
   - Scope of name dialing: Select ⦿ Enterprise or ⦿ Group.
3. Click Save to submit the changes and return the Auto Attendant list.



Edit Auto Attendant Business Hours Prompts

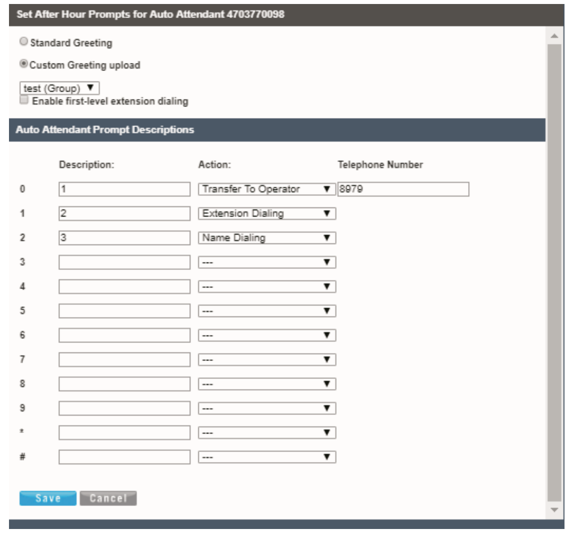
1. Click on the Edit link next to the desired Auto Attendant listing to review the current settings.
2. Click on the Set Business Hours Prompts button.
3. Select ⦿ Standard Greeting or ⦿ Custom Greeting, upload and choose a greeting from the drop-down menu.
4. Enable first-level extension dialing: Click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



7. Click the Save button to update the system with the new Auto Attendant settings and return to the Auto Attendant list.

Edit Auto Attendant After Hours Prompts

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

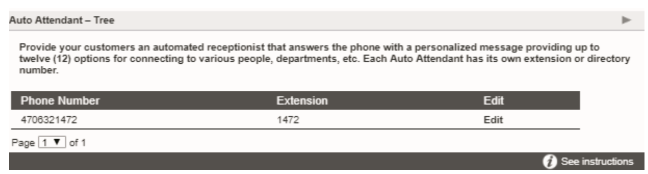


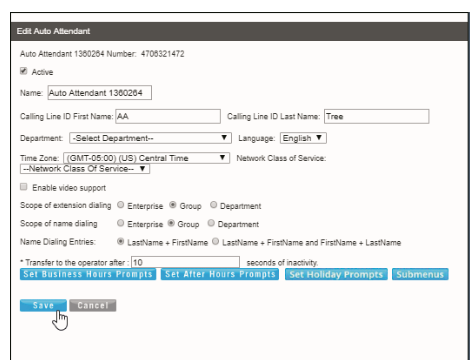
Auto Attendant – Tree

Manage the advanced settings for Auto Attendant lines and create one or more submenus to handle additional lines, multiple calling schedules, individual departments, etc. While in the Settings page, click the adjacent ▶ arrow under View/Edit to open the *Edit* view.

Edit Auto Attendant Tree Advanced Settings

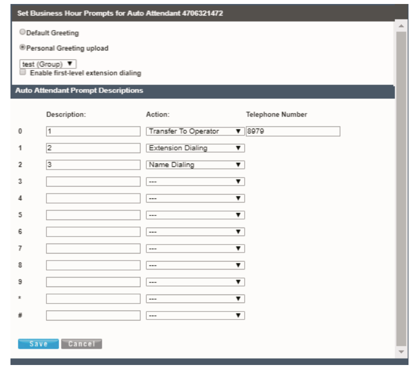
1. Click on the Edit link next to the Auto Attendant listing to review the current settings.
2. Make the following changes, as needed:
   - Active: Click within the checkbox to set to ❒ *Active* or ☐ Disabled.
   - Name: Type a name that displays in lists.
   - Calling Line ID First Name / Last Name: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





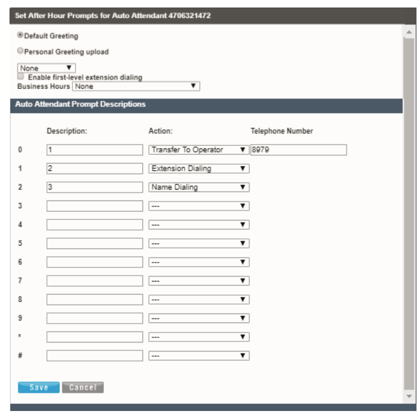
Set Auto Attendant Tree Business Hours Prompts

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



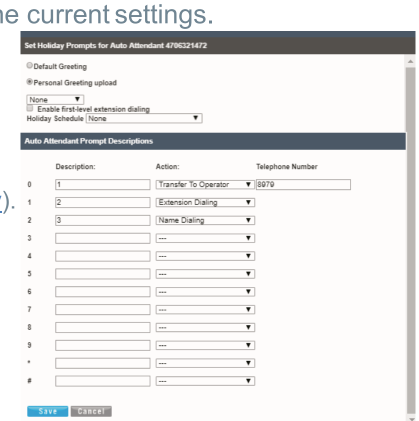
Set Auto Attendant Tree After Hours Prompts

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



Set Auto Attendant Tree Holiday Prompts

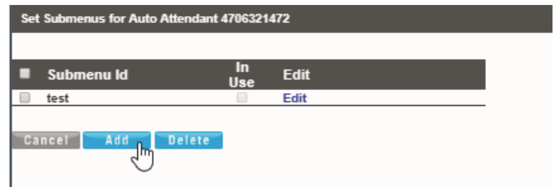
1. Click on the Edit link next to the Auto Attendant listing to review the current settings.
2. Click on the Set Holiday Prompts button.
3. Select ⦿ Default Greeting or ⦿ Personal Greeting upload and choose a greeting from the pre-defined list in the drop-down menu.
   (These greetings were uploaded previously in Announcement Repository).
4. Click within the checkbox to ☑ Enable first-level extension dialing, as needed.
5. Holiday Schedule: Choose an option from the drop-down menu.
6. Add up to 12 Auto Attendant Prompt Descriptions and Actions, as needed.
7. Click the Save button to submit the changes and return to the Auto Attendant *Edit* view.
8. Click the Save button to update the system with the new Auto Attendant settings.



Add Auto Attendant Tree Submenus

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

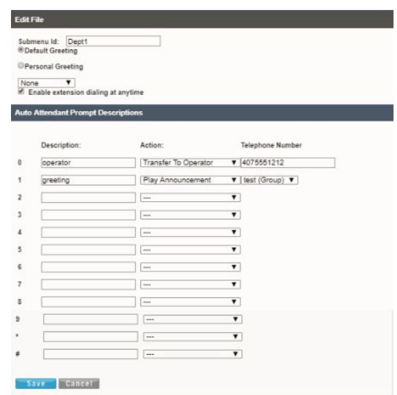
1. Click on the Edit link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the Submenus button to open the *Set Submenus for…* dialog.



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

Edit Auto Attendant Tree Submenus

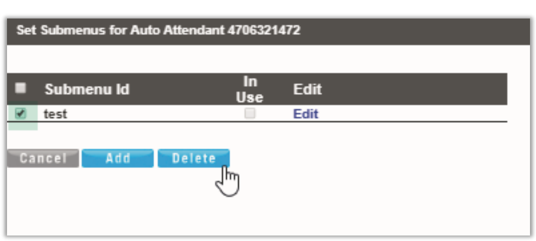
1. Click on the Edit link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the Submenus button to open the *Set Submenus for…* dialog. Click on the Edit link next to the Submenu.
3. Modify the settings or prompts, as needed.
4. Click the Save button to submit the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



Delete Auto Attendant Tree Submenus

Caution: This action is immediate and cannot be undone.

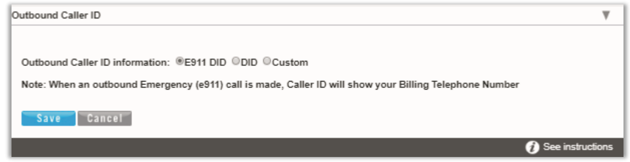
1. Click on the Edit link next to the Auto Attendant - Tree listing to review the current settings.
2. Click on the Submenus button to open the *Set Submenus for…* dialog.
3. Click within the checkbox ☑ next to the Submenu you wish to delete from the list.
4. Click on the Delete button to remove the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



Outbound Caller ID

Manage the Caller ID that is shown for outbound calls from users/devices assigned to the Trunk Group.

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



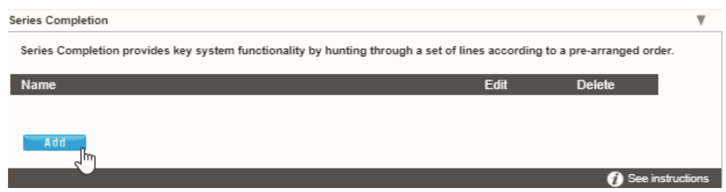
Manage Outbound Caller ID

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

Series Completion

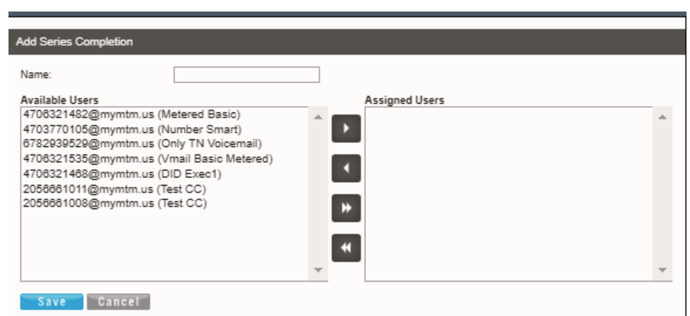
This service provides key *Hunt Group* functionality by allowing the Admin to assign users' lines. The system will hunt through this set of lines according to the pre-defined order and availability.

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



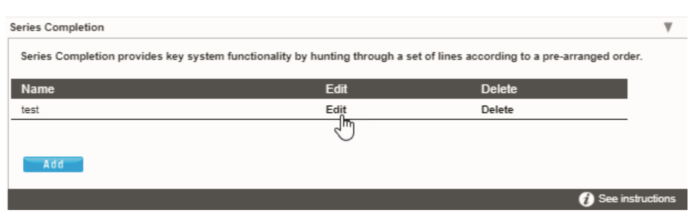
Add Series Completion

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



Edit Series Completion

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

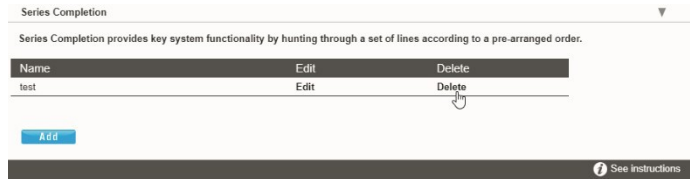


Delete Series Completion

Caution: This action is immediate and cannot be undone.

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

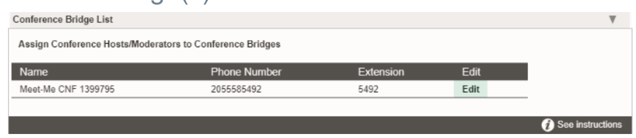
   The selected item is immediately removed from the list and from the system.



Conference Bridge List

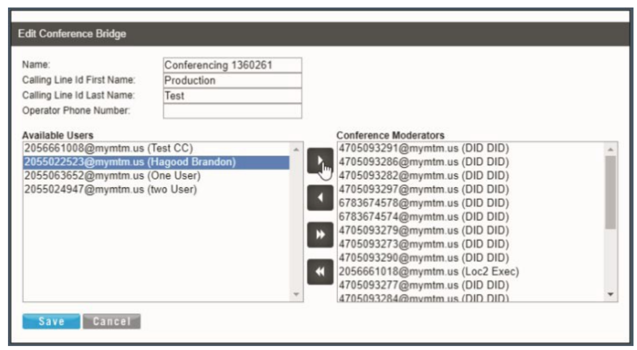
Assign Conference Hosts and Moderators for your Conference Bridge(s).

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



Manage Conference Bridge List

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

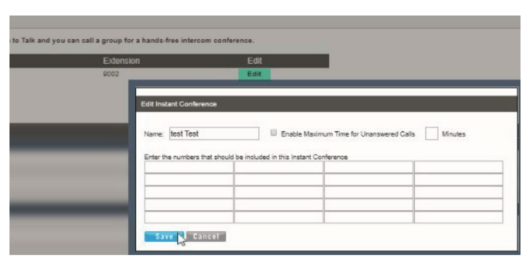


Instant Conference

Manage this feature for use with the Push To Talk service to create hands-free intercom conferencing for Groups. Once defined, users may dial the Instant Conference to Call Group number or use the intercom by dialing *50 followed by the instant conference extension. While in the Settings page, click the adjacent ▶ arrow under View/Edit to open the Edit view.

Manage Instant Conference

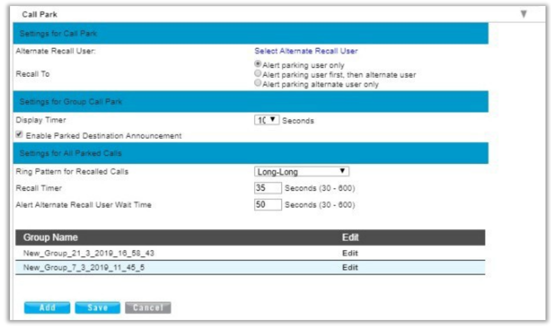
1. Click Add or Edit Instant Conference to manage the Instant Conference group.
2. Enter or modify the Name for the Instant Conference.
3. Maximum Time for Unanswered Calls: Click within the checkbox to ☑ Enable / ☐ Disable and specify a time in Minutes.
4. Enter the appropriate 10-digit phone number(s)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



Call Park (Groups)

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

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



Manage Call Park Group Default Settings

1. Select or Enter the following: Settings for Call Park:
   - Alternate User Recall To: ⦿ Choose a user type.
   - Set Display Timer (in seconds).
   - Click to ☐ Disable/☑ Enable Parked Destination Announcement.
   - Ring Pattern for Recalled Calls: Select an option from the drop-down menu.
   - Recall Timer: Set an amount of time (from 30-600 seconds).
   - Alert Alternate Recall User Wait Time: Set an amount of time (from 30-600 seconds).
2. Click the Save button to submit the default settings and close the dialog.

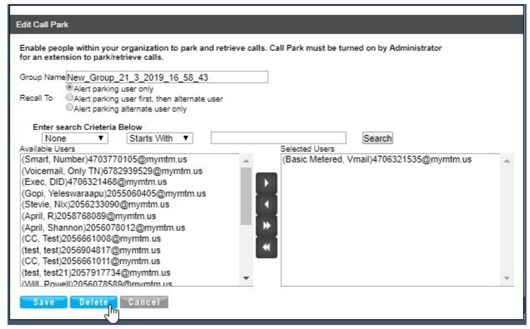
Add a Call Park Group

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

Edit a Call Park Group

1. Modify the Call Park (Group) Default Settings.
2. Click the Save button to update the call park group default settings.
3. Optional: Click the Edit option next to a Group in the list.
4. Modify the Group Name, Recall To, or User assignments.
5. Click the Save button to submit the changes and close the dialog.

Delete a Call Park Group



Caution: This action is immediate and cannot be undone.

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

Call Pickup (Groups)

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

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

Add a Call Pickup Group

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

Manage Call Pickup Groups

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

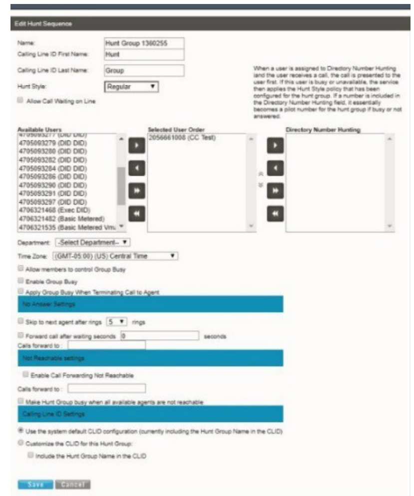
      Or

   b. Use Caution: Click the Delete button to instantly remove the group from the system and close the dialog.

Advanced Hunting

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

Manage Advanced Hunting Settings



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

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

   - Department: Select the appropriate department from the drop-down selection list.
   - Time Zone: Select the appropriate time zone for the group/location.
   - Allow Members to control Group Busy: Click to ☑ Enable / ☐ Disable.
   - Enable Group Busy: Click to ☑ Enable / ☐ Disable.
   - Apply Group Busy When Terminating Call To Agent: Click to ☑ Enable / ☐ Disable.
   - Skip to next agent after x rings: Click to ☐ Disable / ☑ Enable and select the amount of rings.
   - Forward call after waiting x seconds: Click to ☐ Disable / ☑ Enable and select the amount of seconds.
   - Enable Call Forwarding Not Reachable: Click to ☑ Enable / ☐ Disable.
   - Calls forward to: Enter the 10-digit phone number/SIP URI.
   - Make Hunt Group busy when all agents are not reachable: Click to ☑ Enable / ☐ Disable.
   - Use system default CLID: Click to ⦿ Enable / ○ Disable.
   - Customize the CLID for this Hunt Group: Click to ⦿ Enable / ○ Disable.
   - Include the Hunt Group Name in the CLID: Click to ☑ Enable / ☐ Disable.
3. Click the Save button to submit the new data and close the dialog.

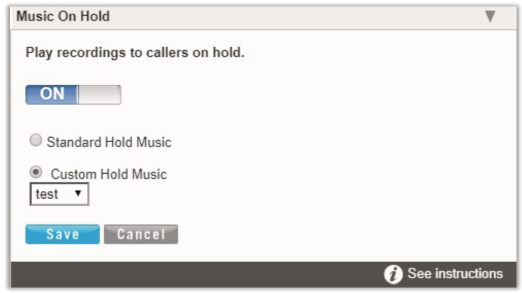
Music On Hold

Manage the music or greeting files played to callers when placed on hold. Basic Instructions and file size requirements are provided via the See instructions link.

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

Manage Music On Hold

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

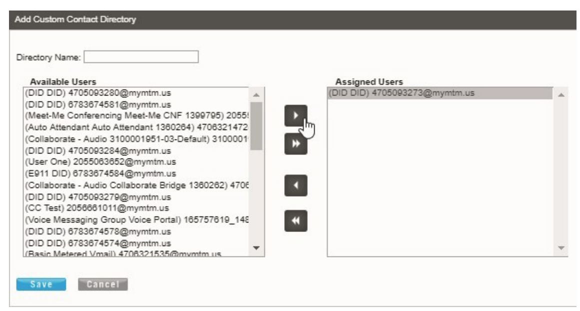


Custom Contact Directory

Create and manage customized contact groups within the directory. While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.

Add a Custom Contact Directory List

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



Edit a Custom Contact Directory List

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

Delete a Custom Contact Directory List

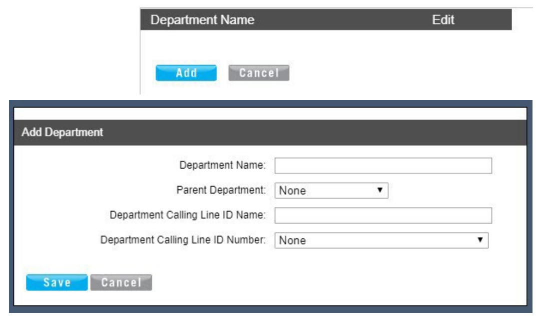
1. Click the Edit option next to a Contact List.
2. Click the Delete button to immediately remove the list from the system and close the dialog.

Departments

Manage Departments for the Location/Group.

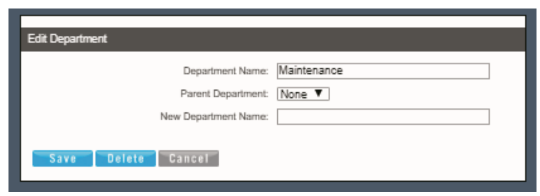
Add a Department

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



Edit a Department

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



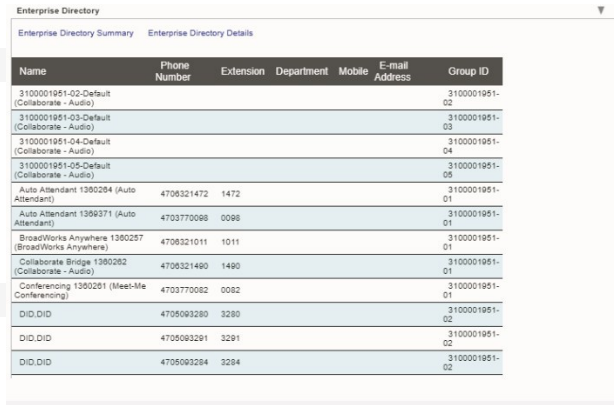
Delete a Department

Caution: This action is immediate and cannot be undone.

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

Enterprise Directory

The Enterprise Directory feature offers an online listing of all phone service information within the Enterprise directory for the account. While in the Settings page, click the adjacent ► arrow under View/Edit to open the *Edit* view.



Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID
3100001951-02-Default (Collaborate - Audio)						3100001951-02
3100001951-03-Default (Collaborate - Audio)						3100001951-03
3100001951-04-Default (Collaborate - Audio)						3100001951-04
3100001951-05-Default (Collaborate - Audio)						3100001951-05
Auto Attendant 1360264 (Auto Attendant)	4706321472	1472				3100001951-01
Auto Attendant 1369371 (Auto Attendant)	4703770098	0098				3100001951-01
BroadWorks Anywhere 1360257 (BroadWorks Anywhere)	4706321011	1011				3100001951-01
Collaborate Bridge 1360262 (Collaborate - Audio)	4706321490	1490				3100001951-01
Conferencing 1360261 (Meet-Me Conferencing)	4703770082	0082				3100001951-01
DID,DID	4705093280	3280				3100001951-02
DID,DID	4705093291	3291				3100001951-02
DID,DID	4705093284	3284				3100001951-02

Print Enterprise Directory Summary

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

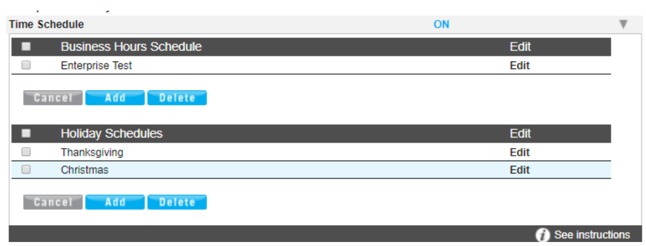
Print Enterprise Directory Details

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

Time Schedule

The Location Time Schedule feature allows Admins to set the group or location's schedules for business hours, holidays, and events. Calls that fall within these times can be sent to voicemail or receive a pre-defined greeting.

Add a Schedule



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

Delete a Schedule

Caution: This action is immediate and cannot be undone.

1. Click within the checkbox ☑ adjacent to a Schedule to select it.
2. Click on the Delete button within that section to <u>immediately</u> remove the Schedule and any events attached to it.

Add an Event

1. Click to place a checkmark next to the preferred option (☑ Business Hours or ☑ Holiday Schedule).
2. Click Add Event to define the following options for a specific event type:
   - Event Name: Required - Type a short title for review in lists.
   - Start Date: Select the date the event begins.
   - Select the All Day Event checkbox ☑, or define the following:
   - Start Time, End Time, and/or End Date.

- Optional: Recurs – (Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week)
- Optional: Recur every x (Months or Year and/or the Numerical day of the month).
- Optional: End – *Never*, *After (x # of occurrences)*, or *Date* (set the end date).

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

Edit an Event

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

Delete an Event

Caution: This action is immediate and cannot be undone.

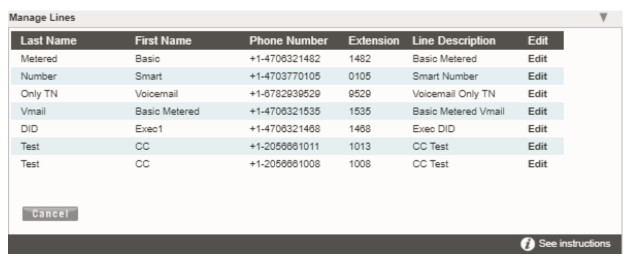
1. Click within the checkbox ☑ adjacent to a Schedule to select it.
2. Click the Edit option next to the selected item to review the schedule's list of Events.
3. Click within the checkbox ☑ adjacent to an Event listed within the dialog to select it.
4. Click on the Delete Event button.
5. Click on the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

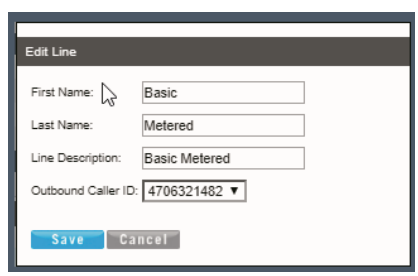
Manage Lines

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

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

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





Manage Users

Manage users, their access rights and extension assignments.

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

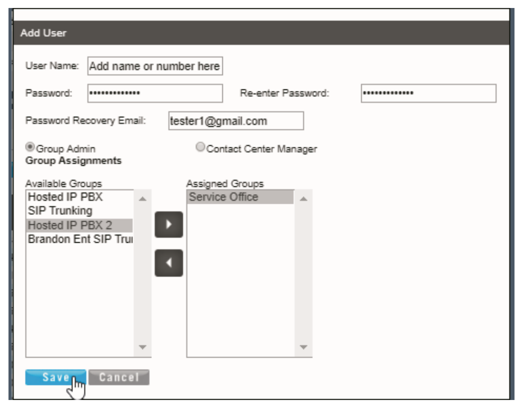
Manage User Password and Recovery Email

1. Locate the user you wish to modify within the list. Click the Edit option next to the selected user.
2. Enter the following, as needed:

   - Password: Type the new Password and again in Re-enter Password to confirm.
   - Password Recovery Email: Type the full email in name@email.com format. This is where the system will send the recovery information.
3. Click the Save button to submit the change and close the dialog.

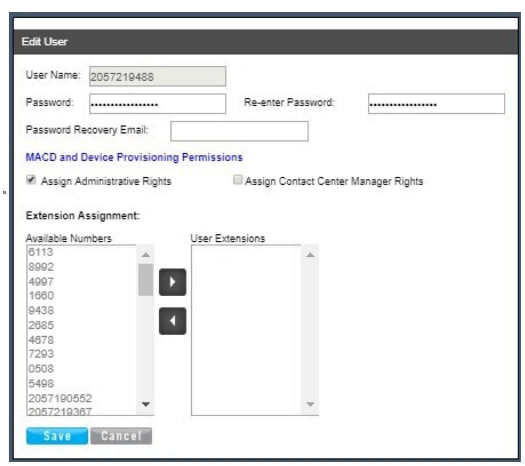
Add Users to Groups

1. Click the Add User button. Enter or define the following:
   - User Name: Type the name or designation (phone number, device type, etc.) you wish to display in lists.



   - Password: Enter and reenter the password assignment for the user.
   - Password Recovery Email: Enter an email address for password recovery notifications.
   - Group Admin: Click to enable/disable this as the initial assignment.
   - Contact Center Manager: Click to enable/disable this as the initial assignment.
   - Highlight item(s) in the Available Groups section and use the arrows to add to the *Assigned Groups*.
2. Click the Save button to submit the change and close the dialog.

Edit User Access and Extension

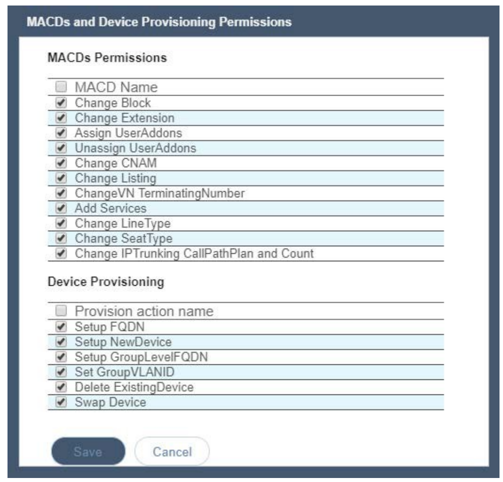


1. Locate the user you wish to modify within the list.
2. Click the Edit option next to the selected user.
3. Make changes to the following, as needed:
   - Password (and repeat)
   - Password Recovery Email: Enter a new email address.
   - ☑ Assign Administrative Rights to Enable, as needed.
   - ☑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

Set MACD and Device Provisioning Permissions

Additional permissions for managing MACD (Service Changes) and Device Provisioning may be defined by an Administrator with access to modify those settings. Each assignment provides access to manage the specified areas and features when the user logs in as Admin. See also Devices and Service Changes.

1. Locate a user with the Admin set to Yes within the list. Click on the Edit option next to the selected user.
2. Click on the MACD and Device Provisioning Permissions link to review and edit those settings.
3. Click within the checkboxes to ☑ enable or ☐ disable appropriate administrative inventory management permissions and service change access to following, as needed:
4. Click the Save button to submit the changes, close the dialog, and return to the *Edit User* view.



Delete Users

Caution: This action is immediate and cannot be undone. Any assignments, associations or add-ons must be managed as well.

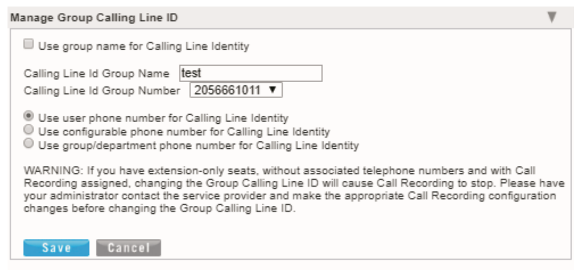
1. Click within the checkbox ☑ adjacent to a user to select that individual.
2. Click the Delete User button to instantly remove the user from the list and from the system.

Manage Group Calling Line ID

Important: If your system uses extension-only seats (without associated telephone numbers) along with *Call Recording* assigned, changing the Group Calling Line ID here will cause the Call Recording feature to stop working. Please have an authorized contact request the appropriate Call Recording configuration changes by the Operator/Service Provider before changing the Group Calling Line ID.

1. Define or select from the following options, as needed:
   - Use Group name for Calling Line Identity:

     Click within the checkbox ☑ to Enable and define the following options as needed:
     - Calling Line ID Group Name: Enter the group name that displays in Caller ID
     - Calling Line ID Group Number: Select the number option from the list.
     - Use User phone number for Calling Line identity: ⦿ Click to enable, as needed.
     - Use configurable phone number for Calling Line identity: ⦿ Click to enable, as needed.
     - Use group/department phone number for Calling Line Identity: ⦿ Click to enable, as needed.

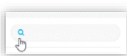


2. Click the Save button to submit the changes and close the dialog.

Services & Users

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

Section Search



Locate any data found within the table below.

Check Registration Status

Poll NEPS / Broadsoft provisioned device registration status and update.

Favorites ★

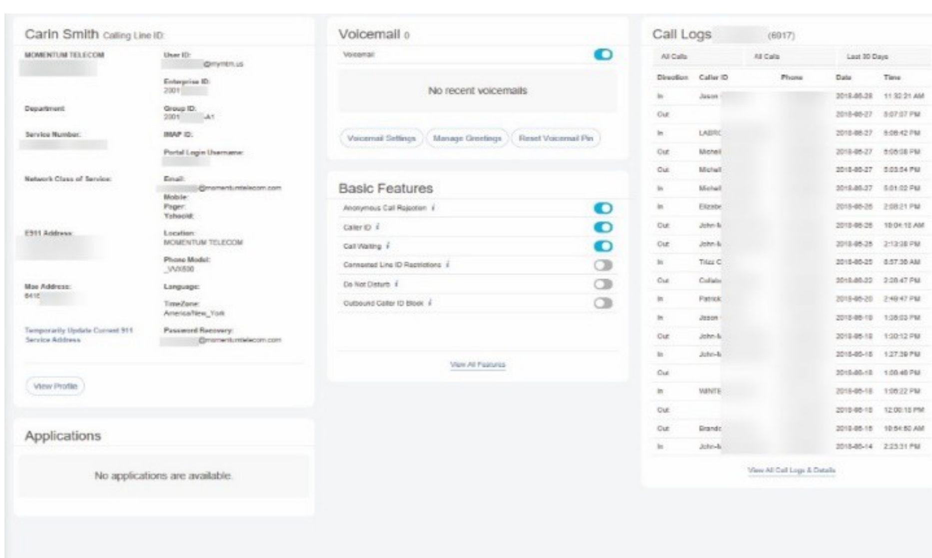
The first column allows Admins to set Favorites ★ for easy Dashboard access.

Service ID & Ext

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

Manage Services & Users

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



User Profile

This dashboard card displays the current profile information and the View Profile button provides access to manage temporary e911 locations, Change the Password, Manage notification emails and update directory information.

Voicemail

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

Call Logs

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

Applications

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

Basic Features

This card displays the On/**Off** feature settings for easy access and the View All Features & Services link offers direct access to the user's Settings page to manage all services and features provided for the account.

Working with User Settings

Clicking on the View All Features link at the bottom of the Basic Features card opens the Settings page, which lists the features and services that are available to the user in an easy to read table format, and provides access to View and to Edit the settings for each feature.

Settings

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

- Features are generally grouped by type to make similar features easy to locate.
- On/Off features show their current status within the table.
- The arrow ► under the View/Edit column (far right) for a feature opens the *Edit* view.
- Many of the On/Off features shown in this list and the individually enabled settings shown here may also be managed through the user's device using phone codes, AKA: Star Codes. (ex: *77).

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

Access the Settings Page

1. In the Dashboard: Click on the View All Features link in the Basic Features card to open the Settings page.

View / Edit User Feature Settings

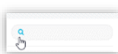
1. In the Settings page: Click on the arrow ► under the View/Edit column next to a feature to open its *Edit* view and modify the feature setup.

Instructions for managing individual user level features and services are provided in the User Guide.

Trunking

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

Section Search



Locate data found within the table below.

Column Links

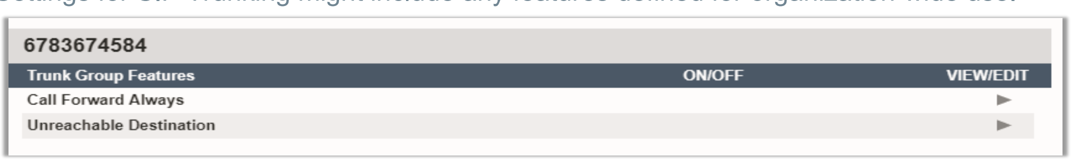
The link in the Location ID column provides access to review the list of *Services & Users* assigned to the Trunk group. The Pilot DID link opens the User Services Dashboard and Profile for the account.

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

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

Manage Trunking Settings

General Settings for SIP Trunking might include any features defined for organization-wide use.



For Example:

Call Forward Always

This feature defines the overall behavior of Forwarding and Routing for the SIP Trunk. Click on the arrow ▶ under the View/Edit column to open the *Edit* view for this service.

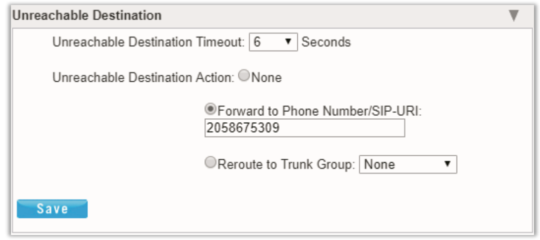
The default action for *Call Forwarding Always* is **None**.

1. Click to enable one of the following alternate options, as needed:
   - Forward to Phone Number/SIP-URI: and enter the 10- digit number (no spaces or special characters).
   - Reroute to Trunk Group and select the group using the drop-down menu.
2. Click the Save button when finished to submit the data and close the settings dialog.

Unreachable Destination

Manage the behavior for calls when the dialed destination is unreachable. The default action is None. Click on the arrow ► under the View/Edit column next to a feature to open its *Edit* view.

1. Click to enable one of the following alternate options, as needed:
   - Forward to Phone Number/SIP-URI: and enter the 10- digit number (no spaces or special characters).
   - Reroute to Trunk Group and select the group using the drop-down menu.
2. Click the Save button when finished to submit the data and close the settings dialog.



Note: Trunking settings are made available for administration here per the organization's requirements. If additional features or services are displayed for Trunking administration, please refer to the sections in this guide that describe working with those features.

Enterprise Settings

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

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

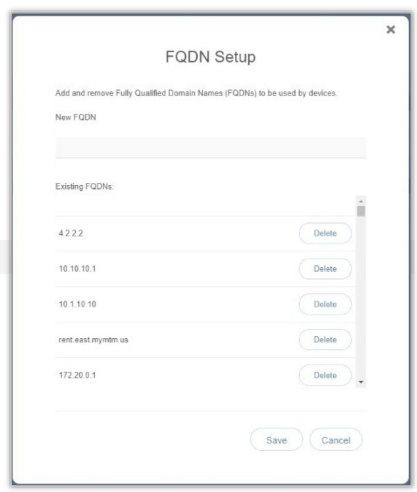
Enterprise FQDN Setup

Manage the Fully Qualified Domain Names (FQDNs) to be used by devices in inventory on the account.

Add a Fully Qualified Domain Name (FQDN)

In the *Enterprise Settings* view:

1. Click the Edit icon adjacent to FQDN Setup.
2. Enter a new FULLY QUALIFIED DOMAIN NAME in the text field.
3. Click Save when finished to update the list of available FQDNs and close the dialog.



Delete a Fully Qualified Domain Name (FQDN)

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

In the *Enterprise Settings* view:

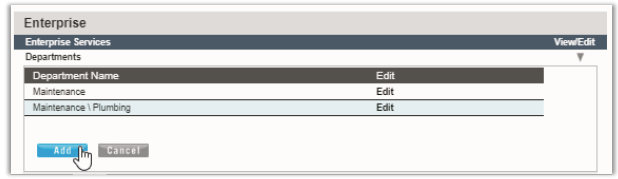
1. Click the Edit icon adjacent to FQDN Setup.
2. Click the Delete button adjacent to an existing FQDN listing.
3. Click Save when finished to close the dialog.

Enterprise Departments

Administrator-level access to manage departments for the entire organization.

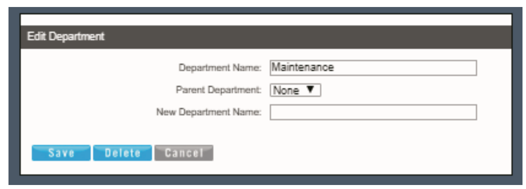
Add a Department

In the Departments edit view:



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

Edit a Department



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

Delete a Department

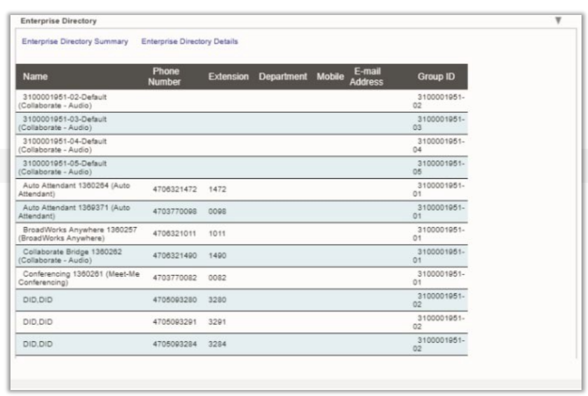
Caution: This action is immediate and cannot be undone

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

Enterprise Directory

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

Print Enterprise Directory Summary



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

Print Enterprise Directory Details

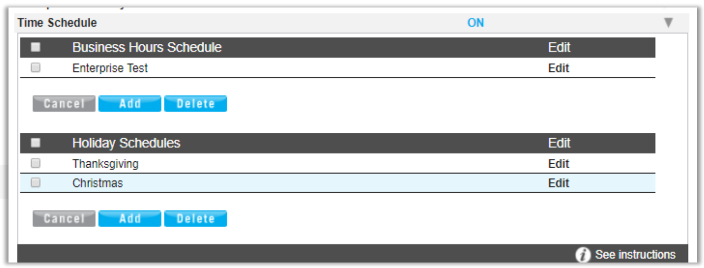
1. Click on the Enterprise Directory Details link to view a detailed Phone List that is ready to print using your browser feature.

Enterprise Time Schedules

The Enterprise Time Schedule feature allows Admins to set the global schedules for during or after business hours, holidays, and events, and manage them online.

Add a Schedule

1. Click to place a checkmark next to the preferred option (☑ BUSINESS HOURS or ☑ HOLIDAY SCHEDULE).
2. Click the Add button under that option.
3. Enter a unique SCHEDULE NAME.
4. Click the Save button when finished.



Delete a Schedule

Caution: This action is immediate and cannot be undone.

1. Click within the checkbox ☑ adjacent to a Schedule to select it.
2. Click on the Delete button within that section to immediately delete the Schedule and any events attached to it.

Add an Event

1. Click to place a checkmark ☑ next to the preferred option (BUSINESS HOURS or HOLIDAY SCHEDULE)
2. Click Add Event to review and define the following options, as needed for a specific event type:
   - EVENT NAME: Type a short title for review in lists.
   - START DATE: Select the date the event begins.
   - ALL DAY EVENT Select the checkbox ☑, OR define the Start Time, End Time, and/or End Date
   - RECURS: (Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week).
   - RECUR EVERY x (Months or Year and/or the Numerical day of the month).
   - END: Never, After (x # of occurrences), or Date (set the end date).
3. Click on the Save button when finished to submit the data and close the pop-up dialog.

Edit an Event

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

Delete an Event

Caution: This action is immediate and cannot be undone.

1. Click within the checkbox ☑ adjacent to a Schedule to select it.
2. Click the Edit option to view the Time Schedule Edit dialog and the list of *Events*.
3. Click within the checkbox ☑ adjacent to an EVENT to select it.
4. Click on the Delete Event button.
5. Click on the Save button to update the Schedule and close the dialog.

Enterprise Agent Default Settings

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

Manage Enterprise Agent Default Settings

1. Select and define the following settings for Agents assigned to the Contact Center:
   - Use Guard Time Settings: Click within the radial button to enable either ⦿ Default or ⦿ Enterprise.
   - Click within the box ☑ to Enable guard time and select the amount of time in *Seconds* using the drop-down menu.

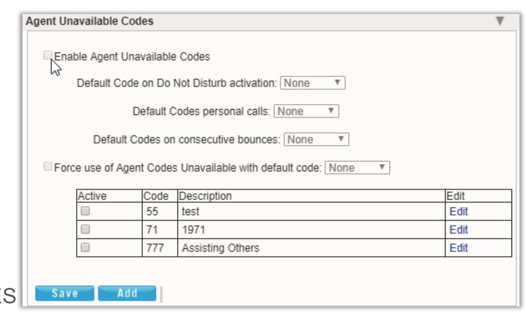
   - Use Agent Unavailable Settings: Click within the radial button to enable either ⦿ Default or ⦿ Enterprise.
   - Click within the box ☑ to enable Force Agent to unavailable on do not disturb activation.
   - Click within the box ☑ to Force Agent to unavailable on personal calls.
   - Click within the box ☑ to Force Agent to unavailable after x consecutive bounces, and specify the number of bounces using the drop-down menu.
2. Click the Save button when settings are defined to submit the changes and close the dialog.

Enterprise Agent Unavailable Codes

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

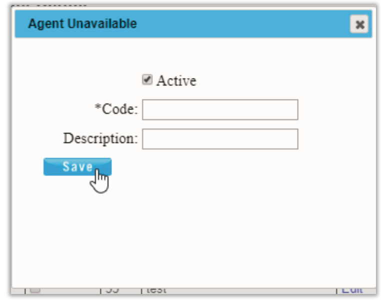
Enable Agent Unavailable Codes

1. Select and define the following settings, as needed:
   - Enable Agent Unavailable Codes - Click within the box ☑ to Enable/ ☐ Disable.



   - Default Code on Do Not Disturb - Choose the correct option using the drop-down menu.
   - Default Codes personal calls - Choose the correct option using the drop-down menu.
   - Choose the Default Codes on consecutive bounces using the drop-down menu.
   - Force use of Agent Codes Unavailable with default code - Click within the box ☑ to enable and select a code using the drop-down menu.
2. Click the Save button to submit the data and close the dialog.

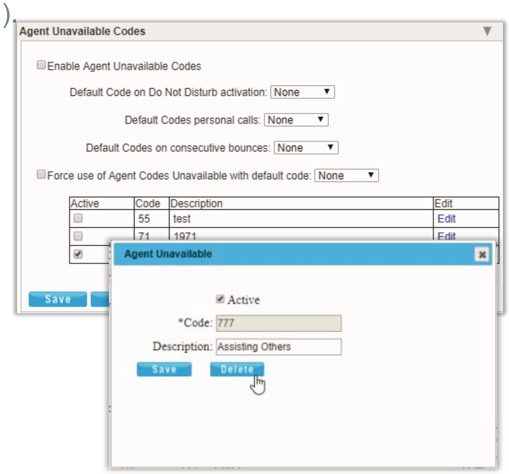
Add Agent Unavailable Codes



1. Click on the Add button to begin adding a new code.
2. Click within the ACTIVE checkbox ☑ to *enable* the new code for usage.
3. Type the new CODE in the field provided.
4. Type a DESCRIPTION / title that will be displayed for review in lists.
5. Click the Save button and close the dialog.
6. *Optional*: Review the list of codes and click within the boxes adjacent to each to Activate ☑ or Deactivate ☐ individual items.
7. Click the Save button to submit the changes and close the Agent Unavailable Codes edit settings dialog.

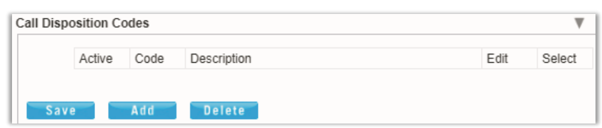
Edit Agent Unavailable Codes

1. Make changes to the following, as needed:
   - Click to Enable/Disable AGENT UNAVAILABLE CODES (all).
   - Choose alternate default code selections.
   - Click to ☑ Activate or ☐ disable individual codes.
   - Click on the Edit link next to a Code in the list to change the code or the description, or to Delete it.
2. Click the Save button(s) to submit the changes, update the system, and close the dialogs.



Enterprise Call Disposition Codes

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

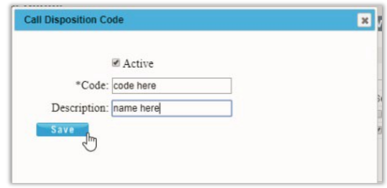


Add Call Disposition Codes

1. Click the Add button to create a new Call Disposition Code.
2. Click within the ACTIVE checkbox to Enable ☑ (default) or Disable ☐ the new code.
3. Enter the new CODE in the field provided.
4. Type the DESCRIPTION (name) in the field provided.
5. Click the Save button to submit the new data and close the dialog.

Edit Call Disposition Codes

1. In the Call Disposition Codes Edit view, you may make the following changes:
   - Activate/Deactivate Call Disposition Codes: Click within the Active checkbox to Enable ☑ or Disable ☐ the selected code.
   - Edit Call Disposition Code information: Click on the Edit option next to an item in the list to review and modify the CODE and DESCRIPTION information.



2. Click the Save button(s) to submit all changes and close dialogs.

Delete Call Disposition Codes

Caution: This action is immediate and cannot be undone.

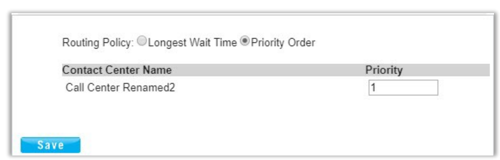
1. Click within the checkbox ☑ in the Select column next to a listed code, *Example: Agent Unavailable Code*.
2. Click on the Delete button to remove the code from the system.
3. Click the Save button(s) to submit all changes and close dialogs.

Enterprise Contact Center Routing Policies

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

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

Manage Enterprise Contact Center Routing Policies



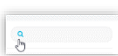
1. Select an overall Routing Policy:
2. Click the radial button next to ⦿ Longest Wait Time (default) or ⦿ Priority Order.
3. If Priority Order is selected, define the order of priority (1, 2, 3…) for each of the listed Contact Centers.
4. Click on the Save button to submit the changes and Exit.

Devices

The Devices section offers a searchable table list view of All Devices, as well as individual lists of the Assigned and Unassigned devices that have been added into the *inventory* of the account. Admins may also have access to Add, Configure, Unassign/Remove devices, or Export the list of devices and their current setting information to a **.csv** spreadsheet. The information provided for each device listed within the table includes: MAC address, Make Model, ACQ Code, Assigned To, Location, FQDN, TN Count, and whether it is Video Enabled.

Function icons to the right of each device listing offer access to review the device's activity History, Configure the device, 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 Manage 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 provisioned device registration status.
Registration data is updated and the latest poll time stamp is displayed.

Unassign

Unassign Allows authorized users to delete the current assignment for a device, or Unassign and Remove the device from inventory.

Remove

Remove

Delete unassigned devices from inventory.

Edit

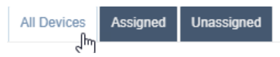
Edit

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.

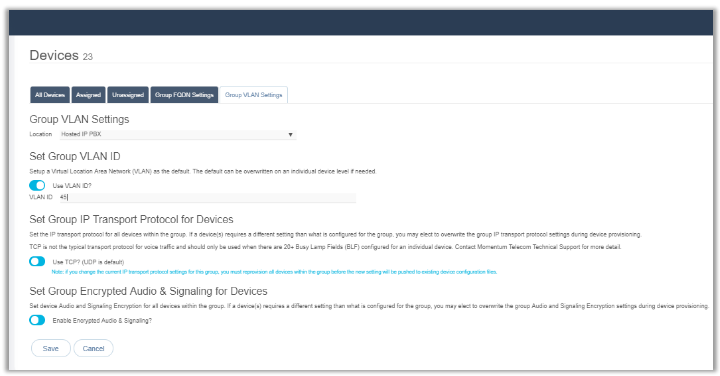


While in the Devices section, click on a tab at the top of the page to view related lists of devices in inventory (if any) and to access the inventory management tools for those devices.

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+ 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

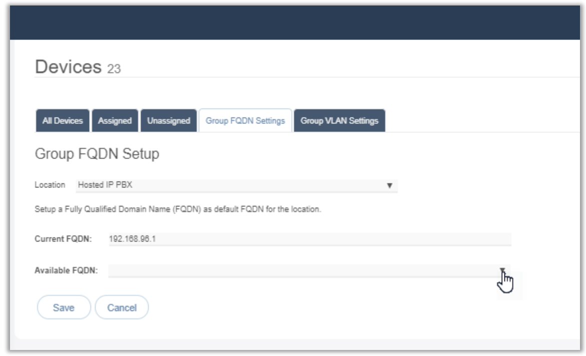
Enable Encrypted Audio & Signaling? On/Off setting. Click to slide the toggle to ON as needed for usage.

4. Save - Click on 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**:

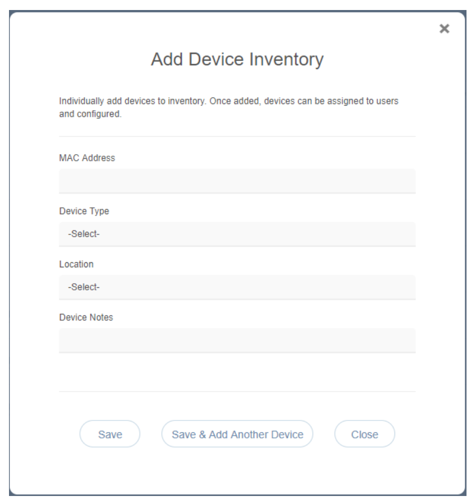


1. Click on the *Group FQDN Settings* Tab.
2. Location - Choose a location option from the drop-down menu list.
3. Current FQDN – Read Only. Displays any current default FQDN assignment for the location.
4. Available FQDN – Click within the field to open the drop-down selection list and choose an option 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
4. 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 for reporting or distribution.

View Device Activity History

The History column of the Devices page offers quick button access to review the activity (provision, configuration, and assignment) history of each device. *While working in Devices*:

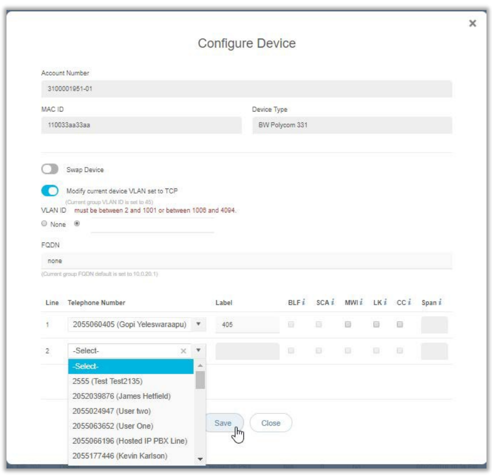
1. Click on the History button adjacent to a device to instruct the system to open a new dialog, and load the device's activity history for review.
2. Click the Close button to exit the dialog and return to the Devices list view.

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 as a reference. Note: The 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.



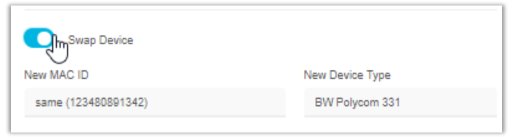
Note: Device configuration options are dependent on the BroadWorks features and services that are enabled for use by the organization.

While working in Devices:

1. Click on the Configure button adjacent to a Device in the list to open the Configure Device dialog.
2. Select or specify the device configuration options, as needed or required.
   (Note: The information displayed in darker gray fields is read-only.)
3. Define the Telephone Number, Label (extension), and service/feature behavior options for each Line.
4. 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:



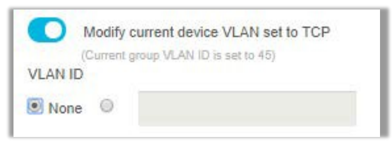
1. Click to toggle the Swap Device setting switch to ON.
2. Select the New MAC ID from the drop-down list.
3. Select the New Device Type from the drop-down list of available options.

   OR – Click the setting toggle switch to *disable* .
4. Click Save to update the information and close the dialog.

   OR – Click Close to exit the dialog without making changes.

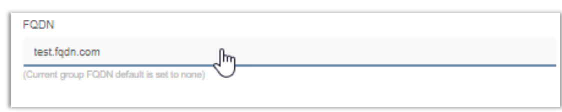
Modify Current Device VLAN Set to TCP

1. Click to toggle the switch to Enabled or Disable.
2. Click to select None, OR
   Click to select the other radio button and enter a VLAN ID in the adjacent text field (must be between 2 and 1001 OR between 1006 and 4094 and the current Group VLAN ID is shown - in this example the default is 45.)
3. Click Save to update the information
   Or click Close to quit and exit.



Set Device FQDN Assignment

While working in Configure Device:

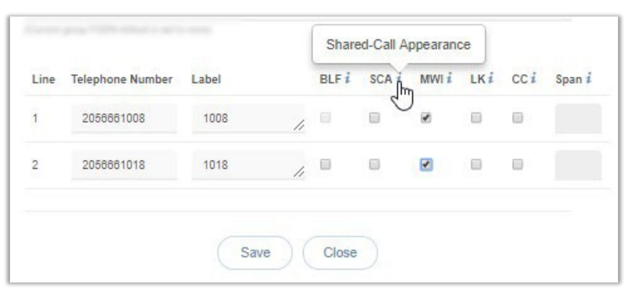


1. Click within the FQDN field to select from the available *Fully Qualified Domain Name* options in the drop-down list.
2. Click Save to update the information, or click Close to quit and exit.

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 – Locate and select a telephone number or name 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 checkbox to enable *Busy Lamp Field* (presence information) for any secondary line(s).
   - ☑ SCA – Click to place a check in the corresponding checkbox 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 checkbox to enable *Message Waiting Indicator* on the line. Recommended.
- ☑ LK – Click to place a check in the corresponding checkbox to enable *Line Key Span* on the line.
- ☑ CC - Click to place a check in the corresponding checkbox 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. The system updates and the dialog closes.

Modify Device Configuration

While working in Devices:

1. Select a device within one of the Device Tab lists.
2. Click the Configure

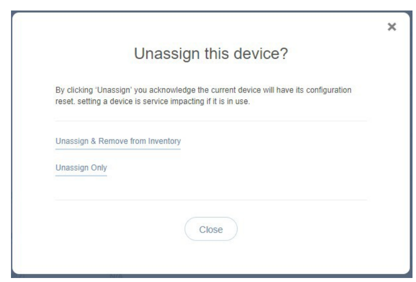
 button adjacent to it.
3. Make changes to the current device settings or line features, as needed.
4. Click Save when all necessary configuration changes for the device have been defined. The system updates and the dialog closes and returns focus to the Devices list view.

Unassign a Device

While working in Devices:

1. Click on the Unassign button adjacent to the device to be unassigned.

Admins have **two** options when Unassigning devices – to remove the assignment only **or** to **remove the assignment and delete the device from inventory**.



Device - Unassign Only

1. 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.

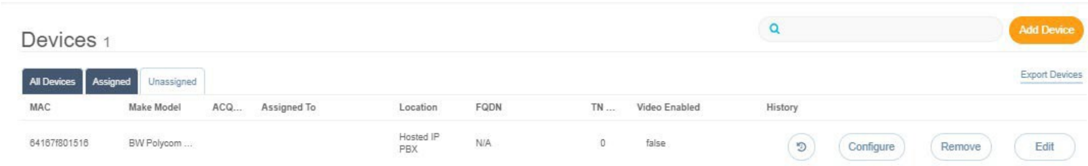
Device - Unassign and Remove from Inventory

Use Caution. This action cannot be undone.

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. The device (and any assignments or configurations) is deleted.

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:

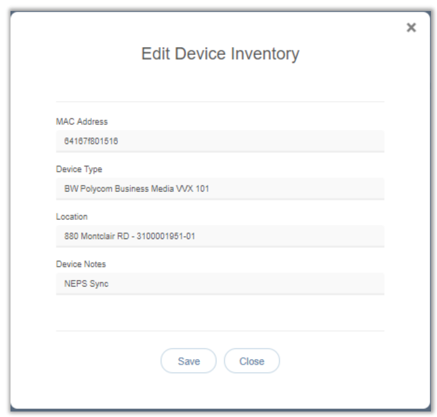
Edit – Select this button to edit the device inventory information before configuring and assigning it.

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, Location and User assignments…).

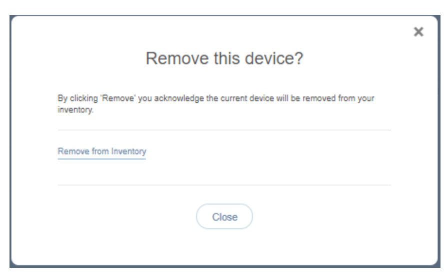
While working in Devices:



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 entered in error.
   - Device Type – Select the correct device type from the drop- down list of options.
   - Location – Select the correct Group/Location from 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 Inventory

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* to review the updated list.

Add a Fully Qualified Domain Name (FQDN)

In the Enterprise Settings view:

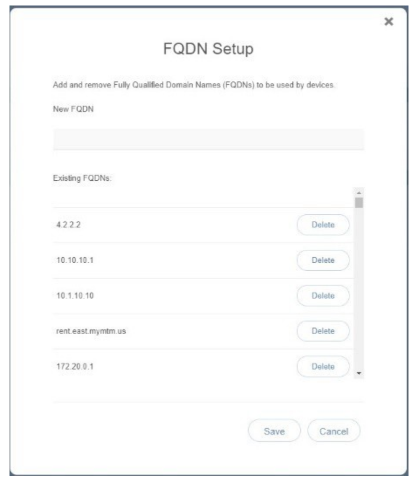
1. Click the Edit icon adjacent to FQDN Setup.
2. Enter a new Fully Qualified Domain Name in the text field.
3. Click Save when finished to update the list of available FQDNs and close the dialog.

Delete a Fully Qualified Domain Name (FQDN)

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

In the Enterprise Settings view:

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

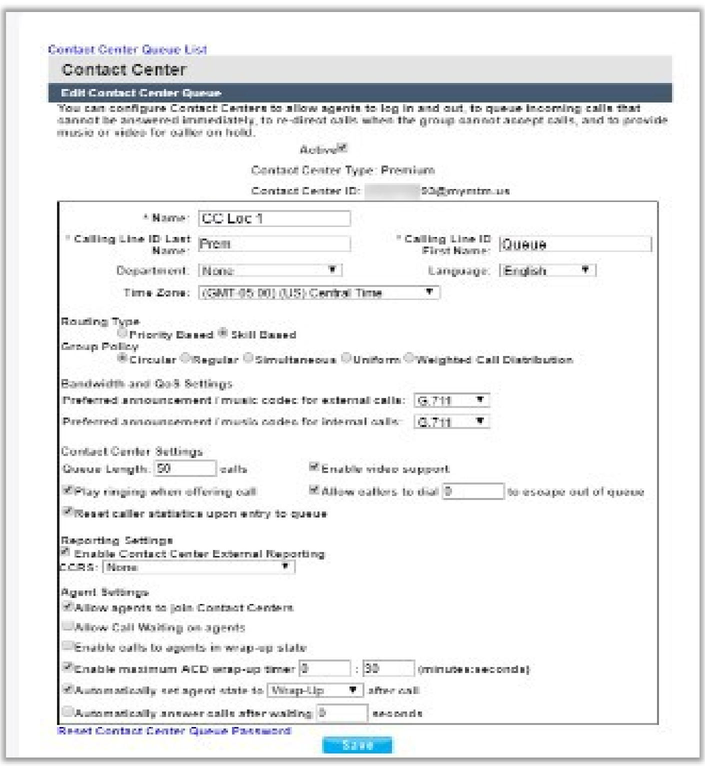


Contact Center

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

Edit Contact Center Queues

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



Edit Contact Center Basics

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

Edit Contact Center Group Policy Settings

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

Edit Contact Center Bandwidth and QoS Settings

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

Edit Contact Center Settings

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

Edit Contact Center Reporting

1. Select or define the following Reporting options, as needed:
   - Enable Contact Center External Reporting: Click within the checkbox to ☑ enable/ ☐ disable.

- CCRs: Choose an option from the drop-down menu.

2. Click the Save button to submit all changes and close the dialog - or continue to the next section.

Edit Contact Center Agent Settings

1. Select or define the following Agent Setting options, as needed:
    - Allow agents to join Contact Centers: Click within the checkbox to ☑ enable/ ☐ disable.
    - Allow Call Waiting on Agents: Click within the checkbox to ☑ enable/ ☐ disable.
    - Enable calls to agents in wrap-up state: Click within the checkbox to ☑ enable/ ☐ disable.
    - Enable maximum ACD wrap-up timer _MM_ : _SS_ : Type the ADC wrap-up time limit in Minutes and/or Seconds

2. Automatically set agent state to____after call: Click within the checkbox to ☑ enable/ ☐ disable. Click the Save button to submit all changes and close the dialog.

Reset Contact Center Queue Password

Manage the password for the Contact Center.

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

Configure Contact Center Features

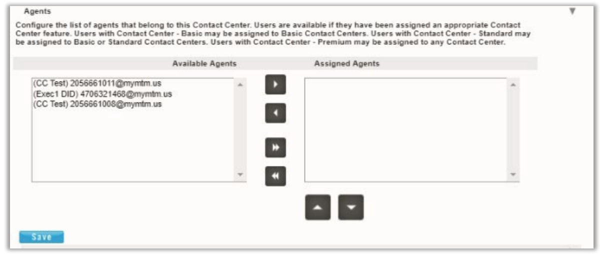
The Configure option for a listing in the Contact Center page opens the *Contact Center Queue List* where the Basic, Advanced and Routing Policy feature settings may be managed. Activation for usage of many of these features must also be defined in the *Edit* Contact Center Queue section.

1. Click on the **Configure** link for a Contact Center listing to open the *Configure Contact Center Queue* dialog. The list of features and services displays.
2. Click on the arrow ▶ under the View/Edit column next to a feature to open its *Edit* view.

Contact Center Agents

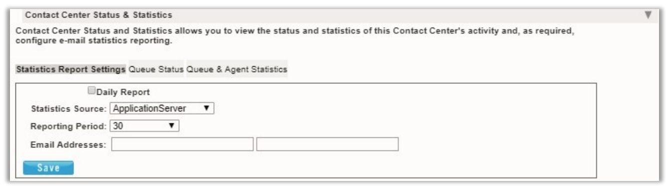
Configure the list of agents that belong to the selected Contact Center. Users are available for selection if they have been assigned an appropriate Contact Center feature. *Users with Contact Center - Basic may be assigned to Basic Contact Centers. Users with Contact Center - Standard may be assigned to Basic or Standard Contact Centers. Users with Contact Center - Premium may be assigned to any Contact Center.*

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



Contact Center Status & Statistics

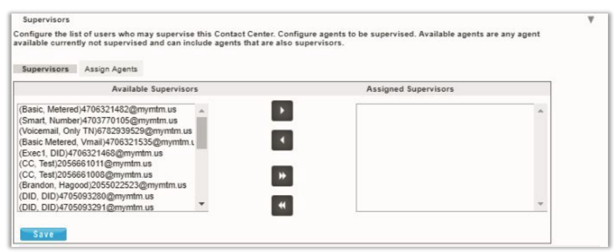
Configure how the status and statistics of this Contact Center's activity are viewed and setup the email recipient(s).



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

Contact Center Supervisors

Manage the Supervisors and Agent assignments for this contact center.



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

Contact Center Announcements

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

1. Select and define the following announcement options, as needed:
   - ☑ Play Entrance Message
   - ☑ Entrance Message is mandatory when played
   - Audio: Select desired option:
     - ⦿ Default
     - ⦿ URL - enter the URL(s) in order ofplay
     - ⦿ Custom - select File(s) in order ofplay.

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

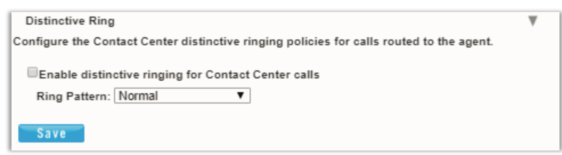
Manage Contact Center Announcement Repository

Manage the announcements and greeting files used by this Contact Center. As with the Announcement Repositories for any Locations, Groups or Departments, the file requirements and current usage amounts for the Contact Center's announcement files are displayed to the Admin, and basic instructions for uploads and management are provided via the SEE INSTRUCTIONS link.
See Announcement Repository

Contact Center Distinctive Ring

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

1. Click to ☑ Enable distinctive ringing for Contact Center Calls.
2. Ring Pattern: Select the desired ring tone pattern from the drop-down menu options.

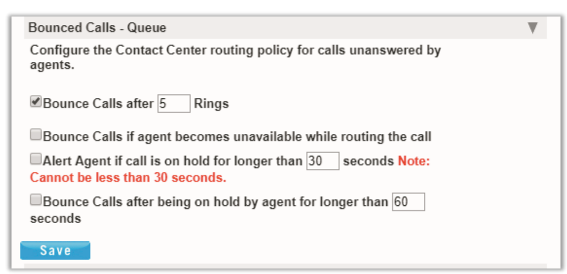


3. Click the Save button when finished to update the system and close the dialog.

Contact Center Bounced Calls – Queue

Configure the Contact Center routing policy for unanswered calls.

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

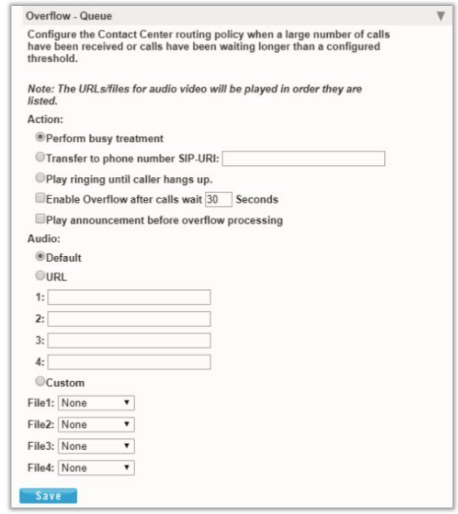


2. Click the Save button when finished to submit the data and close the dialog.

Contact Center Overflow – Queue

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

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

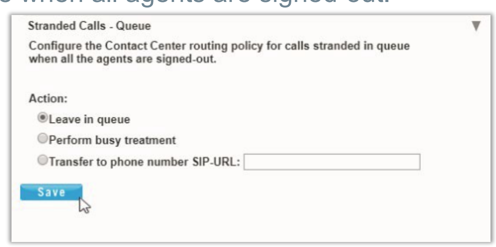


   - ⦿ Perform busy treatment.
   - ⦿ Transfer to phone number SIP URI.
   - ⦿ Play ringing until caller hangs up.
   - ☑ Enable Overflow after calls wait x Seconds and select the amount of time (seconds) from the drop- down menu.
   - ☑ Play announcement before overflow processing and define the audio file(s)/types below.
   - Audio: Select desired option:
     - ⦿ Default
     - ⦿ URL and enter the URL(s) in order ofplay
     - ⦿ Custom and select File(s) in order ofplay.
2. Click Save when finished to submit the data and close the dialog.

Contact Center Stranded Calls – Queue

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

1. Select one of the following action options:



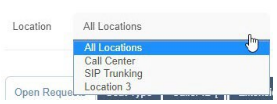
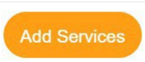
   - ⦿ Leave in queue
   - ⦿ Perform busy treatment
   - ⦿ Transfer to phone number SIP or URL: Select to enable and enter the appropriate 10-digit number or URL.
2. Click the Save button when finished to submit the data and close the dialog.

Service Changes

The Service Changes section of the Logix Cloud Services Portal is an advanced Administration tool which requires additional access permissions to be in place in order for the user to see and work with the tools it provides.

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

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.
	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 Open Requests for *All Locations*. Information is provided in a sortable table view. Tabs above the table offer access to all of the service change areas and the tools to perform related actions and tasks.

The *Change* management areas are only non-billable and may include sections like:

Open Requests, Caller ID [CNAM], Block, Extension, and Virtual Terminating Number.

Open Requests

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

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

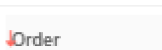
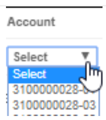
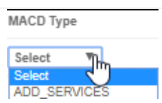
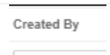
Click on the Location drop-down at the top of the page and select an available option to filter the view by Open Requests for the selected location.

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.

View Open Requests by Location

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

Order	Account	MACD Type	Created By	Status
 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.	 Select an account number option from the drop-down list to only show open requests for that account.	 Select an available MACD type option from the drop-down list to show only that type of open request in the table below.	 Type a name or part of a name to filter the list by a creator. The drop-down also displays all service change creators as selection options.	 Drop-down selection tool which allows users to filter the list by order status.

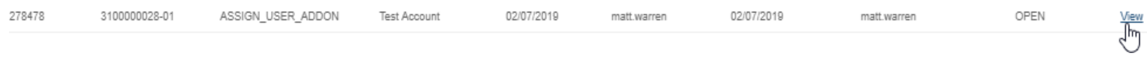
Clear Filters

Click this link above the far right column to remove filters and return to the default sort and display order.

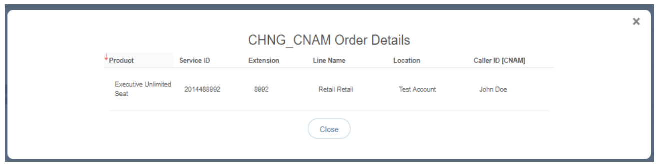
View a Service Change Order

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.



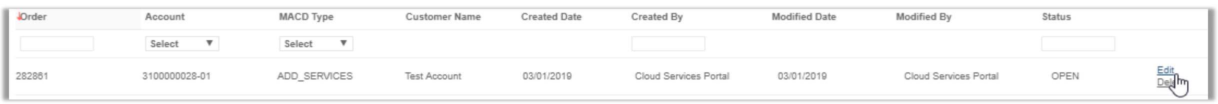
2. Click Close when finished to exit the dialog and return to the list of Service Change requests.



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.

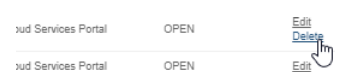
   Note: *Each service change type requires specific information for configuration. The system will assist users and notify if any missing information is discovered during the auto-confirmation process it completes prior to allowing the order to be submitted.*

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

Delete a Service Change Order

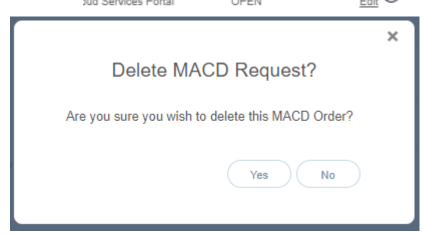
If a service change order can be deleted, the option to do so is provided.

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.

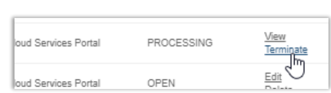
   The service change order is deleted and the system updates the list of Open Requests. The history of the action is also recorded and may be reviewed by clicking on the View All Service Changes *link at the top of the Service Changes section.*



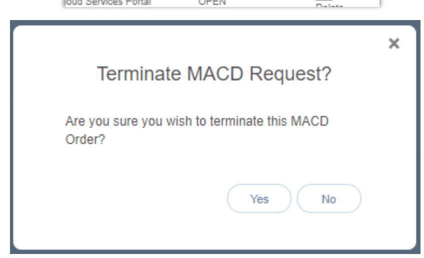
Terminate a Service Change Order

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.



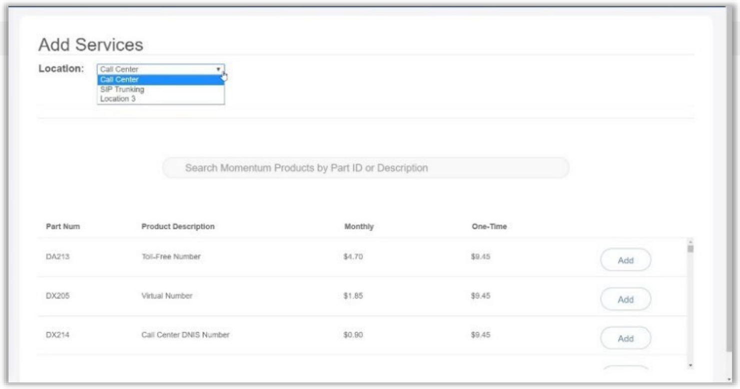
2. Click Yes when prompted to complete the termination.



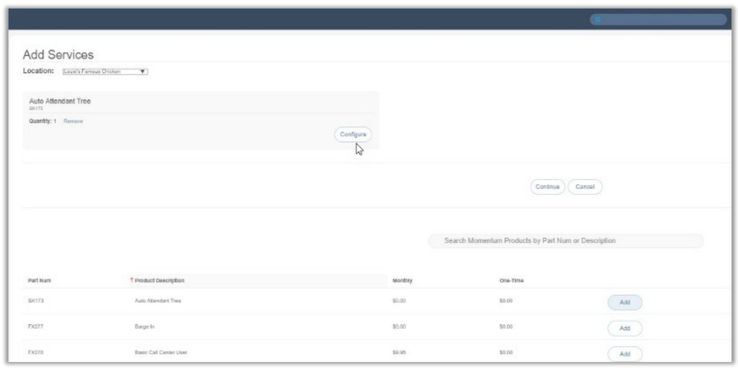
Add Services

Where enabled, this button offers Advanced access to create and submit a new service order for a location on the account.

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. Choose the desired service by:
   a. Enter a term in the *Search* tool above the list.
   b. Scroll through the list of available items.

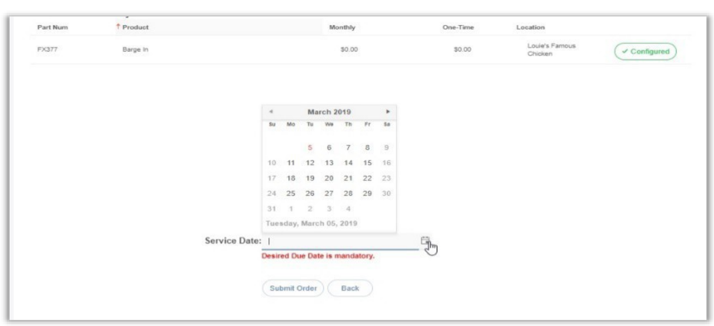


4. Click the Add button adjacent to a desired item to select it.
   The selected item is displayed at the top of the page to allow for *configuration*.

   Most service change types require specific configuration information in order to submit for processing.

   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.*

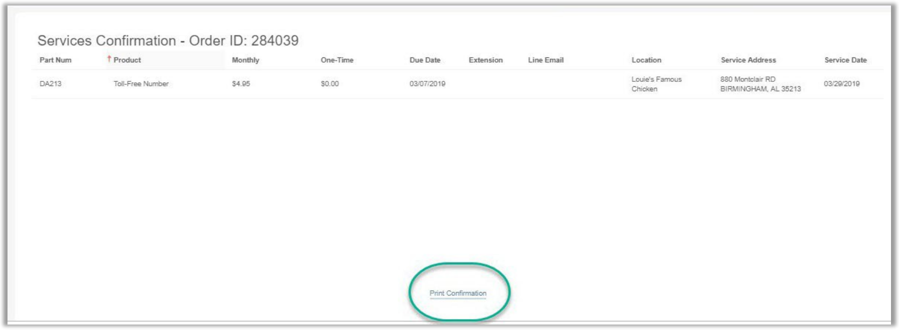
5. Click Configure to view configuration details.
6. Enter all required and any useful information for configuration of the selected item.
7. Click Save. The system will review and then either provide a Success! message, or indicate that there is missing/required configuration information, and will provide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



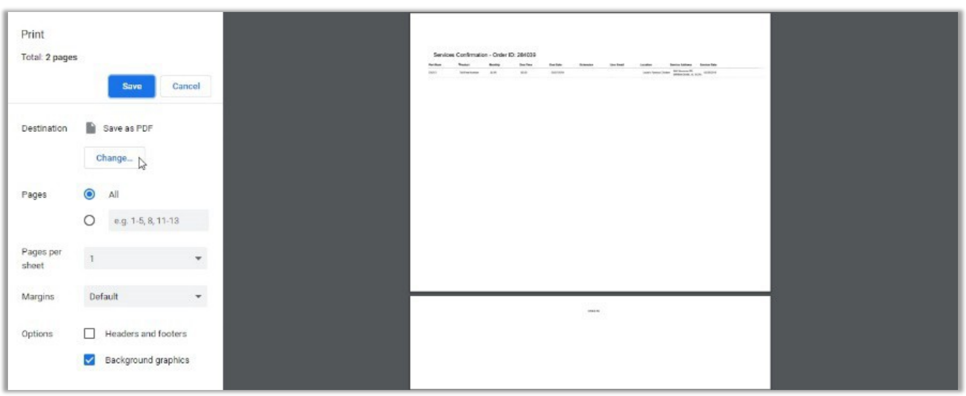
During validation, the system will note any <u>current</u> services or products that are inconsistent or incompatible with a new order selection, as well as those that already exist and do not need to be re-ordered, and then inform the user.

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.

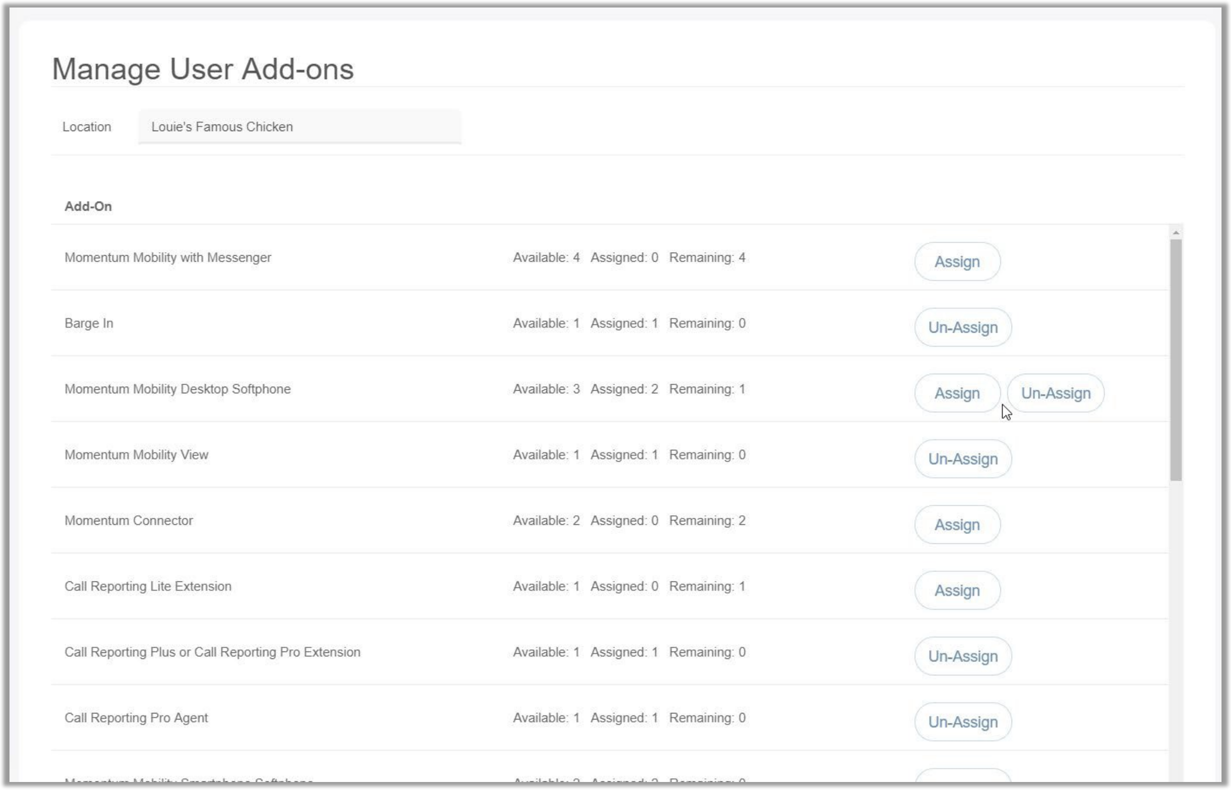


1. Click on the Print Confirmation Link to open the Print dialog.
2. Accept the default settings (PDF, All pages, to local file…) or select from the following print options:
   - Destination: Click Change to specify the print type and file location.
   - Pages: Specify the number of pages to print.
   - Pages per sheet: Specify as needed.
   - Margins: Define 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

When available, 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: Assigned User Add-Ons must be Un-Assigned prior to a MACD Service Change request.

Assign a User Level Add-On

Assign

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 for selection.

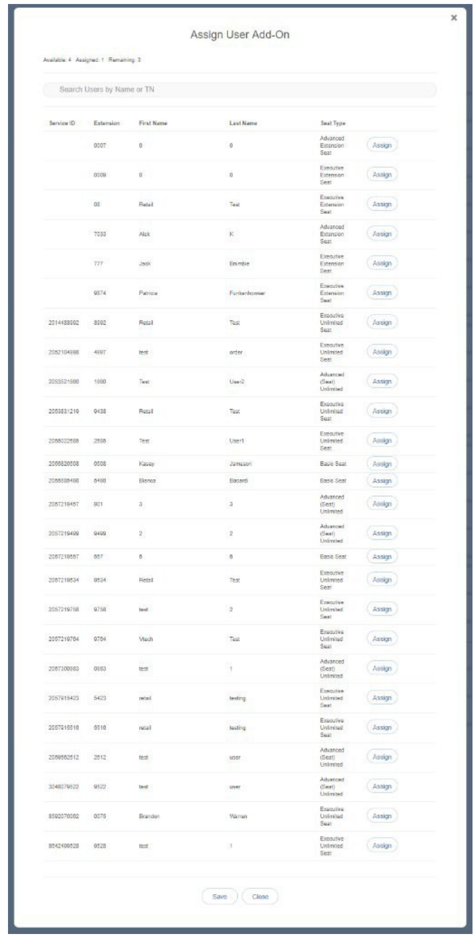
2. Locate the user(s) to be assigned the Add-On:
   a. Scroll through the list to locate the appropriate user.
   b. Use the Search tool at the top of the list to filter the list by name or telephone number (TN).

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.

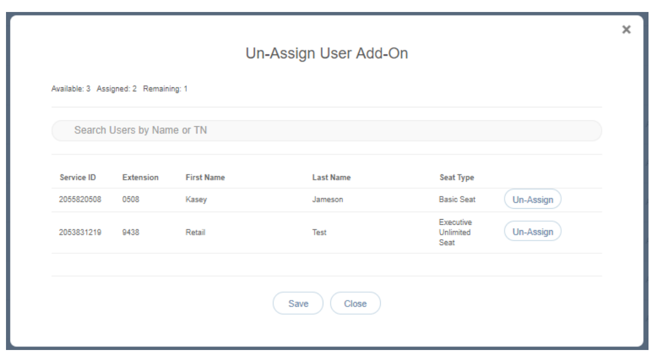


Un-Assign a User Level Add-On

Un-Assign

The Un-Assign management tool is available for User Add-ons that have a count of one (1) or more under Assigned.

1. Click on the Un-Assign button adjacent to an Add-On (far right column).
2. *The list of current Add-On Assignments displays.*
3. Click on the Un-Assign button next to the desired user to remove the assignment.
4. Repeat for any other users if there are multiple Add-Ons to be unassigned.
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.

View All Service Changes

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.

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 is listed in an easy-to-read table format showing the most recent service changes first by default.

Data within the table includes:

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

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

- Sort – The column headers may be used to sort the data in ascending/descending alphanumeric order.
- Filter – The data in the table may be filtered using the tools above the table to modify the view by Order (*number*), Account (*select*), MACD 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 action link options (View, Add, Delete, Terminate) adjacent to each listing in the far right column are dynamically provide the correct actions that can be performed based on the current status of the service change order.

View Service Change 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

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).

Delete a Service Change

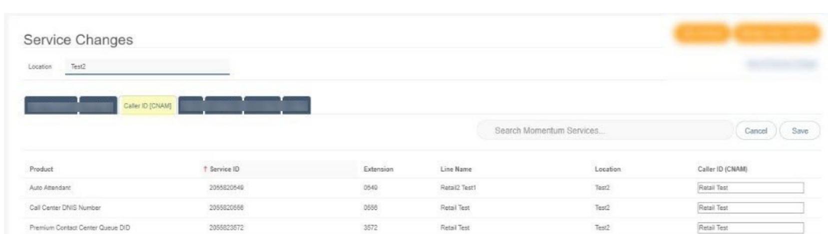
This action is available to select when permissible within the process. Completed orders cannot be deleted. Use Caution: This action cannot be undone.

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

Caller ID (CNAM)

If enabled, allows Admins to 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.

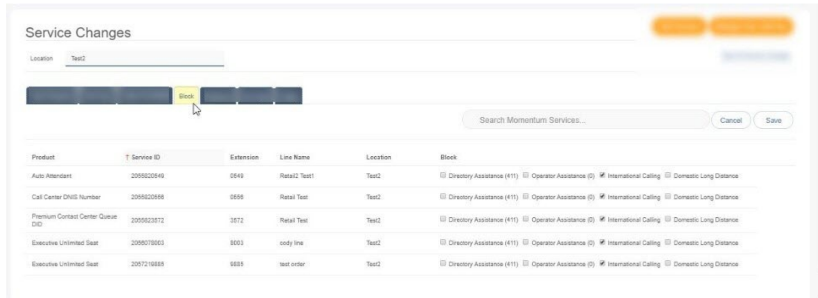
1. Click on the Caller ID [CNAM] tab.
2. Select the appropriate Location at the top of the page to display the assigned lines. Locate the service to be receive a CNAM change within the list
3. Caller ID [CNAM]: Type the name to be displayed to receivers when Caller ID is in use.
4. Repeat for any additional Caller ID [CNAM] changes to other listings.



5. Click Save to submit the changes for processing,
   Or click *Cancel* and confirm when prompted to discard changes.

Block

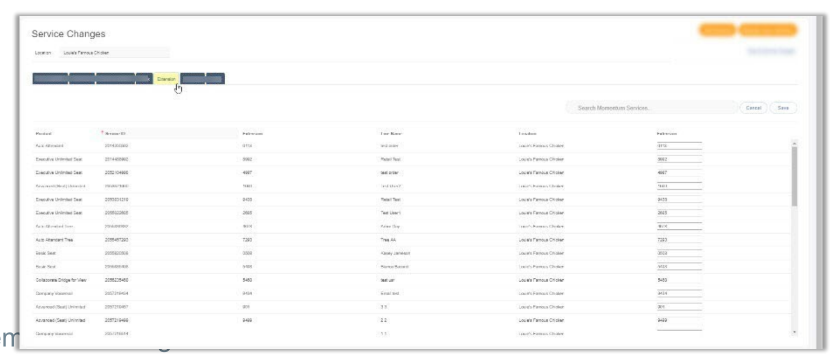
Manage/*change* settings that block specific call types from lines in each Location on the account. In this tab, Column headers may be used to sort the list alphanumerically. A section search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line Name, and Location. Simple On/Off checkbox 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.
4. Block: Click within a checkbox 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.
   - Domestic Long Distance: ☑ Enable to block domestic long distance calls from the line.
5. Click Save to submit the changes for processing, or click *Cancel* and confirm when prompted to discard changes.

Extension

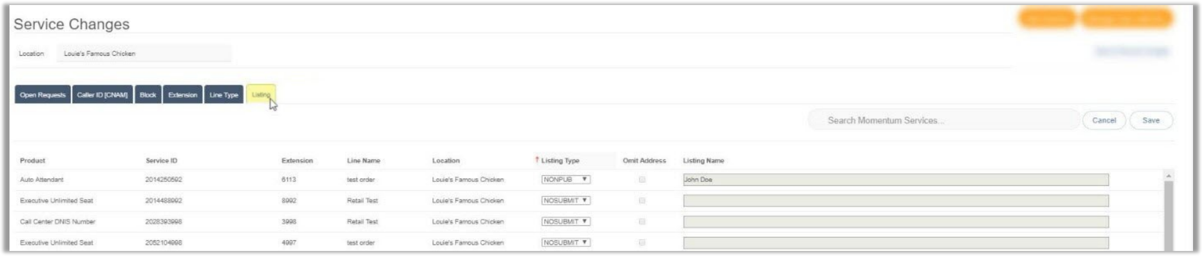
Manage/*change* extension assignments for lines in each location on the account. In this tab, a section search tool is provided to allow users to filter the list by entered terms. The details provided for each of the items in the list include the Product (name), Service ID, Extension (current), Line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



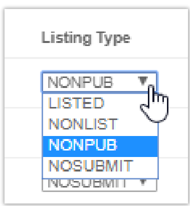
1. Click on the Extension tab.
2. Select a Location at the top of the page to view assigned lines in a simple table format.
3. Locate the item to be changed.
4. Type a new extension number in the
5. Extension field adjacent to the item
6. Repeat as needed for other lines.
7. Click Save when finished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

Listing

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



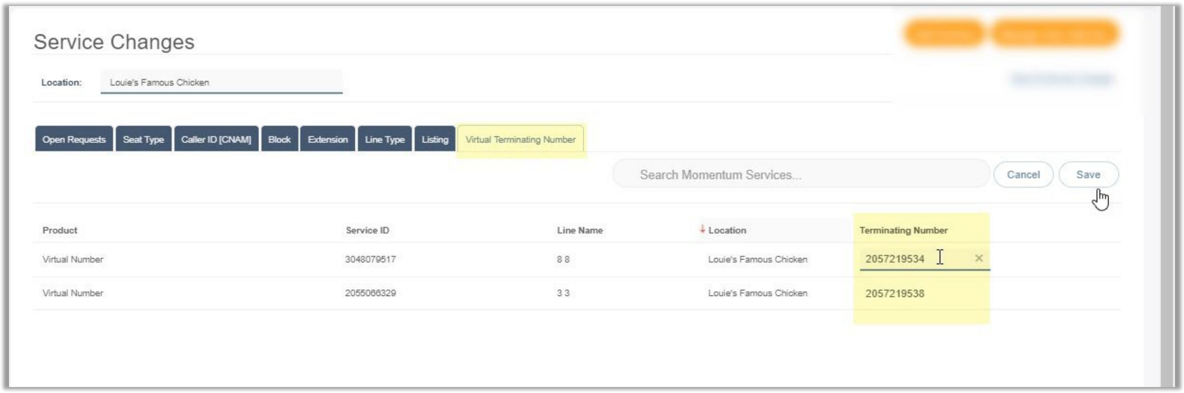
1. Click on the Listing tab to open the section for review.
2. Select a Location at the top of the page. The list for the location displays.
3. Make changes to the following, as needed:
   - Listing Type: Choose from:



     - LISTED – Select to enter information and list.
     - NONLIST – Select to enter information but not include in list.
     - NONPUB – Select to Enter information but not include for publish.
     - NOSUBMIT – *Default. Read-Only*. Select another Listing Type to make changes.
   - Omit Address: Click to place a checkmark in the box to omit 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.