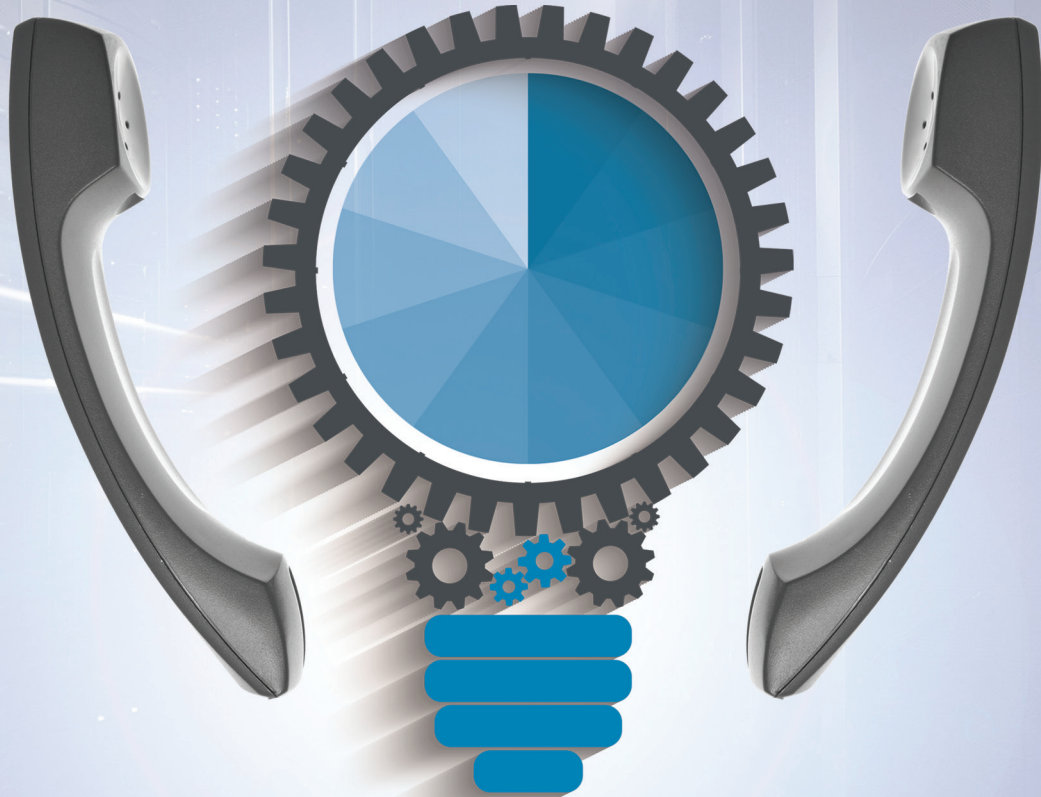


SmartVoice® Portal

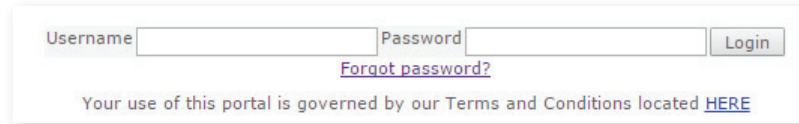


Enterprise/Group Admin Quick Start Guide



ENTERPRISE ADMINISTRATOR

You will have a single Enterprise Administrator assigned to your SmartVoice Customer Portal Account. This “Super” Administrator has access to manage *all locations and end users on the customer's account*. That role will have been assigned during your SmartVoice order process.



The screenshot shows a login form with two input fields: 'Username' and 'Password'. To the right of the 'Password' field is a 'Login' button. Below the input fields is a link that says 'Forgot password?'. At the bottom of the form, there is a line of text: 'Your use of this portal is governed by our Terms and Conditions located [HERE](#)'.

GROUP ADMINISTRATOR

This type of Administrator has access to manage users *at a single customer location or within a department* on the SmartVoice Customer Portal.

END USER

End users are able to manage their *individual* SmartVoice service. Please refer to the SmartVoice Portal End User Guide

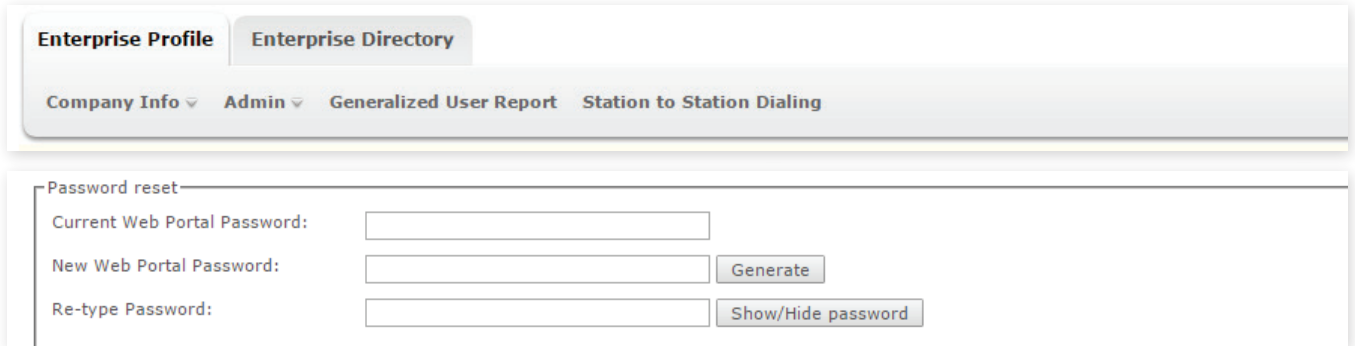
LOGIN

Go to <https://portal.sv.TPx.com>

The Enterprise Administrator will receive an email from TPx with your Username and Password. Note the portal password information is only sent to the Enterprise Administrator and you are responsible for providing that to Group Administrators and End Users..

PASSWORD RESET

During your initial login, you will be required to reset your password.



The screenshot shows a web interface with a navigation bar at the top. The navigation bar has two tabs: "Enterprise Profile" and "Enterprise Directory", with "Enterprise Directory" being the active tab. Below the tabs are four menu items: "Company Info", "Admin", "Generalized User Report", and "Station to Station Dialing". The main content area is titled "Password reset" and contains three input fields: "Current Web Portal Password:", "New Web Portal Password:", and "Re-type Password:". To the right of the "New Web Portal Password:" field is a "Generate" button. To the right of the "Re-type Password:" field is a "Show/Hide password" button.

The system will prompt you to change your Web Portal Password every 90 days, but you can also update it as needed at any time.

FORGOT PASSWORD

The [Forgot password?](#) feature does not work for Group or Enterprise Admin accounts. It is for User Accounts only. An Enterprise Administrator can reset a password for a Group Administrator.

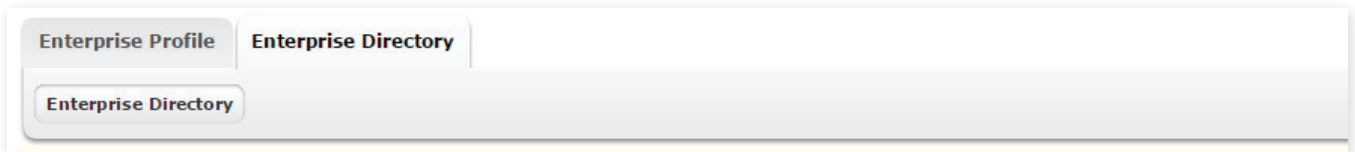
As the Enterprise Administrator, if you cannot get into your portal account and you need the password reset, you will need to contact TPx Communications directly:

Enterprise Admin Password Reset: 877-487-8722

Premier Customers Only: 888-611-8722

ENTERPRISE DIRECTORY

This tab allows you to view users, search for user accounts or create a report to display all of the users and their information.



The screenshot shows a navigation bar with two tabs: "Enterprise Profile" and "Enterprise Directory". The "Enterprise Directory" tab is active and highlighted. Below the tabs is a sub-navigation bar with a single button labeled "Enterprise Directory".

End Users can enter their information on their own in the Profile Tab. The Enterprise and Group Administrators also have access to enter this information for each End User.

Enterprise Profile
Enterprise Directory

Enterprise Directory

Enterprise Directory

[Enterprise Directory Summary](#) [Enterprise Directory Detail](#)
[Enterprise Directory Summary - PDF](#) [Enterprise Directory Detail - PDF](#)

Last Name ▼

Starts With ▼

Search

Note: This Enterprise Directory is provided for your convenience, but TelePacific does not manage or update this information. Please contact your Group

Name ▲	Number ◆	Extension ◆	Mobile ◆	Email Address ◆	Department ◆
Jan	323x514968	4968	x		Sales (121115-730)
Dara	323x514954	4954	x		
Darlene	323x514980	4980	x		
John	323x514982	4982	30x-564-1122	jsmith@tpx.com	
Melissa	323x514955	4955	x		
Donna	323x514952	4952	x		
Jon	323x514956	4956	72x2793000	jonblack@tpx.com	
Matt	323x514983	4983	x		

CREATE NEW GROUP ADMINISTRATORS

Both Enterprise and Group Administrators have the ability to create new Group Administrators within the SmartVoice Customer Portal. Go to the **Group Profile Tab**. Under **Site Info**, there is a selection for **Administrators**.

The screenshot shows the 'Administrators' management interface. At the top, there are navigation tabs: Dashboard, Group Profile (selected), Departments, Manage Users, Group Services, Directory, and CF Not Reachable. Below these are sub-tabs: Site Info (selected), Time Schedules, and Holiday Schedule. The main content area is titled 'Administrators' and contains a table with one entry: TPx_IRVINEG1. To the right of this entry are 'Add' and 'Delete' buttons. Below the table is an 'Edit' form with the following fields: Administrator ID (TPx_IRVINEG1), Last Name (text input), First Name (text input), New Password (text input), Re-type Password (text input), a 'Show/Hide password' button, Language (English dropdown), and Administrator Type (Group). A 'Save' button is located at the bottom left of the form.

Click on **Add** (above) and enter the Administrator information and create a new password for them. You can specify if the new Group Administrator will manage the entire Group (service location) or Users assigned to a specific department only.

This close-up shows the 'Administrator Type' section of the form. It includes a 'Show/Hide password' button, a 'Language:' dropdown set to 'English', and the 'Administrator Type' section. This section has two radio buttons: 'Group' (unselected) and 'Department' (selected). To the right of the 'Department' radio button is a dropdown menu showing 'Sales (121115-730)'. A red dotted line highlights the 'Department' radio button and the dropdown menu. At the bottom, there are 'Save' and 'Cancel' buttons.

SCHEDULES

As an Enterprise or Group Administrator, you can create Time or Holiday Schedules for your different service locations. Under **Group Profile**, click on the **Time** or **Holiday Schedule** tabs to create your new options.

Dashboard | **Group Profile** | Departments | Manage Users | Group Services | Directory | CF Not Reachable

Site Info ▾ | **Time Schedules** | Holiday Schedule

Time Schedules

Lunch

	12 AM	1 AM	2 AM	3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM
Monday																
Tuesday																
Wednesday																
Thursday																
Friday																
Saturday																
Sunday																

Add New Schedule | Save | Rename | Delete

Once this is completed, all of your users will have the option of selecting these group schedules with any of their features that have schedule options to manage their calls, such as **Call Forward Selective** or **Selective Call Acceptance**.

DEPARTMENTS

The Departments tab allows you to organize users into separate groups that can be managed by a specific Group Administrator. These Departments are also identified in the Enterprise Directory.

The screenshot shows a web interface with a navigation bar at the top containing tabs: Dashboard, Group Profile, Departments (selected), Manage Users, Group Services, Directory, and CF Not Reachable. Below the navigation bar is a header for the 'Departments' section. The main content area is titled 'Departments' and contains a form for editing a department. The form has a 'Saved' status and an 'Add' button. Below that, there is a 'Department:' dropdown menu currently set to 'Sales (TPx_IRVINE)' and a 'Delete' button. An 'Edit' section contains three fields: 'Full Name:' with the value 'Sales (TPx_IRVINE)', 'Name:' with a yellowed-out input field, and 'Parent Department:' with a yellowed-out input field. At the bottom of the form is a 'Save' button.

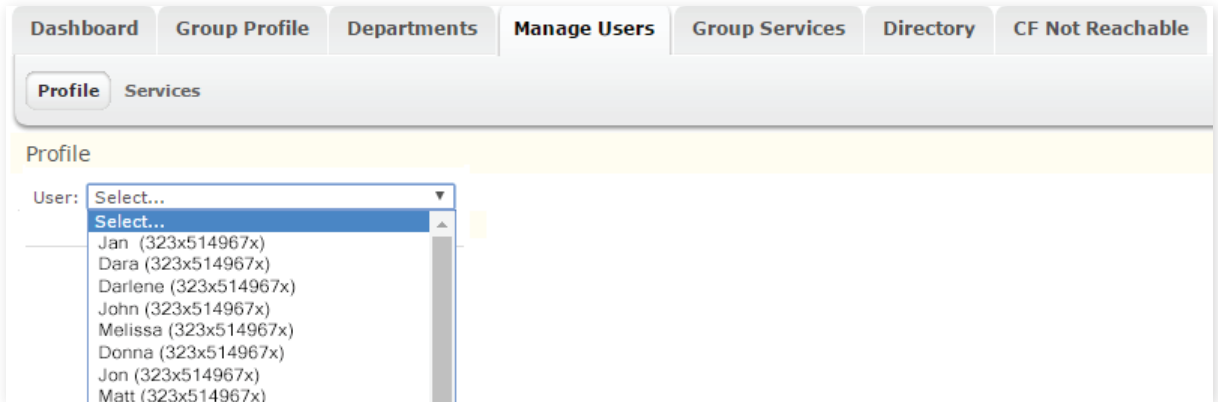
END USERS

As an Enterprise or Group Administrator, you will be able to support your End Users in their use of the SmartVoice Customer Portal. The Dashboard gives you quick access to update a Web Portal Password or Voice Portal Passcode for any of your End Users.

The screenshot shows a user profile card for 'Smith, Jane' with a phone number '323x514968 (x4968)' and a status of 'No calls'. A gear icon indicates settings. Below the card is a form for editing user information. The form is divided into three sections: 'Name', 'Web Portal Password', and 'Voice Portal Passcode'. The 'Name' section has fields for 'Last Name:' (Smith) and 'First Name:' (Jane), with 'Save' and 'Cancel' buttons below. The 'Web Portal Password' section has fields for 'New password:' and 'Confirm password:', a 'Show/Hide' button, and a 'Generate' button. The 'Voice Portal Passcode' section has fields for 'New passcode:' and 'Confirm passcode:', a 'Show/Hide' button, and a 'Generate' button.

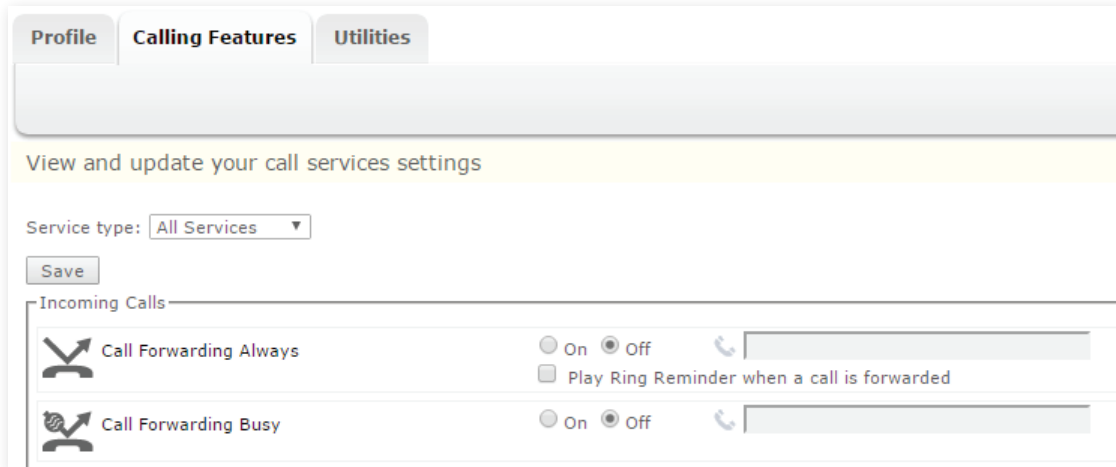
CALLING FEATURES

You can also manage features for End Users if they need some assistance or are unable to manage the features on their own. Click on the **Manage Users** tab and select the User you would like to view.



The screenshot shows a web interface with a navigation bar containing tabs: Dashboard, Group Profile, Departments, Manage Users, Group Services, Directory, and CF Not Reachable. Below the navigation bar, there are sub-tabs for Profile and Services. The Profile sub-tab is active, and a dropdown menu is open, displaying a list of users with their names and phone numbers: Jan (323x514967x), Dara (323x514967x), Darlene (323x514967x), John (323x514967x), Melissa (323x514967x), Donna (323x514967x), Jon (323x514967x), and Matt (323x514967x).

You will then have access to the same views and settings the End User has from their own portal access. You can turn features On or Off and change settings or destination numbers.



The screenshot shows the Calling Features settings page. It has a navigation bar with tabs: Profile, Calling Features, and Utilities. Below the navigation bar, there is a heading: View and update your call services settings. Underneath, there is a Service type dropdown menu set to All Services and a Save button. The main content area is titled Incoming Calls and contains two sections: Call Forwarding Always and Call Forwarding Busy. Each section has radio buttons for On and Off, and a checkbox for Play Ring Reminder when a call is forwarded. There are also phone icons and input fields for destination numbers.

FEATURE DESCRIPTIONS

When you hover your cursor over any of the features, a brief description will display.

Profile **Calling Features** Utilities

View and update your call services settings

Service type: All Services ▾

Save

Incoming Calls

	Call Forward No Answer	<input type="radio"/> On <input checked="" type="radio"/> Off	<input type="text"/>
		Number of rings before forwarding:	3 ▾
	Call Forward Not Reachable	<input type="radio"/> On <input checked="" type="radio"/> Off	<input type="text"/>
	Call Forwarding Selective	<input type="radio"/> On <input checked="" type="radio"/> Off	<input type="button" value="View"/> <input type="button" value="Edit"/>
	Call Forwarding Selective	is On	<input type="button" value="Deactivate"/> <input type="button" value="View"/> <input type="button" value="Edit"/>

Automatically forward your incoming calls to a different phone number when pre-defined criteria, such as the phone number, time of day or day of week, are met.

END USER CHANGES

This access to End User accounts is also beneficial when an employee leaves the company. You can modify call settings such as Call Forwarding to route incoming calls to another number as needed. You can also easily update the Enterprise Directory information. This same functionality makes it very easy to assign an existing number or line to a new employee, get them set up with a new password and update their information into the Enterprise Directory.

GROUP SERVICES

If you have Trunk Group services assigned to your account, you can manage these services under the Group Services tab.

A good example is Trunk Group Call Forwarding which includes many options for you to manage right from the SmartVoice Customer Portal.

- Activating Call Forward Always will re-route all incoming calls to a Trunk Group to the destination number.
- When all Call Paths are in use, calls will be sent to the destination number entered for the Incoming Capacity Exceeded option.
- The Unreachable Destination options will be used in an outage situation.

It is a good idea to add the destination number for both the Incoming Capacity Exceeded option and the Unreachable Destination option as soon as your services are installed. These should be in place ahead of time in case one of these situations occurs.

Profile **Calling Features** **Utilities**

Profile

Save

Call Forwarding Always

Call Forwarding Always Action: None
 Forward to Phone Number:
 Reroute to Trunk Group: **None** ▼

Incoming Capacity Exceeded

Incoming Capacity Exceeded Action: None
 Forward to Phone Number:
 Reroute to Trunk Group: **None** ▼

Unreachable Destination

Unreachable Destination Timeout: **10** ▼ seconds

Unreachable Destination Action: None
 Forward to Phone Number:
 Reroute to Trunk Group: **None** ▼

Note: Depending on the destination number selected, Long Distance charges may apply

HELP

Help available

If you have any questions about a specific feature or the SmartVoice Customer Portal, there is a HELP section in the upper right hand corner of your screen. This HELP Section is a great resource for all of your questions on the SmartVoice Customer Portal.

Enterprise

- ▶ **Understanding Enterprises, Groups and Users**
- ▶ [Menus at the Enterprise Level](#)
- ▶ **Enterprise Profile**
 - ▶ [Enterprise Password Change](#)
 - ▶ [Contact Information](#)
 - ▶ [Generalized User Report](#)
 - ▶ [Station to Station Dialing](#)
- ▶ **Enterprise Utilities**
 - ▶ [Enterprise Directory](#)

Group

- ▶ [Understanding Groups and Users](#)
- ▶ **Group Profile**
 - ▶ [Profile Menu](#)
 - ▶ **Site Info**
 - ▶ [Web Portal Password and Voice Portal Passcode Rules](#)
 - ▶ [Administrators](#)
 - ▶ [Time Schedules](#)
 - ▶ [Holiday Schedules](#)
 - ▶ [Department Menu](#)
 - ▶ [Departments](#)
- ▶ **Resources**
 - ▶ [Numbers](#)
- ▶ **Group Services**
 - ▶ [Group Services Menu](#)
 - ▶ **Site Services**
 - ▶ [Call Park](#)
 - ▶ [Call Pickup](#)
 - ▶ [Hunt Group](#)
 - ▶ [Series Completion](#)
 - ▶ [Trunk Group](#)
 - ▶ [Voice Portal](#)
 - ▶ [Account/Auth Codes](#)
 - ▶ [Feature Access Codes](#)
- ▶ **Directory**
 - ▶ [Directory Menu](#)
 - ▶ [Enterprise Directory](#)
- ▶ **CF Not Reachable**
 - ▶ [CF Not Reachable Menu](#)
- ▶ **Call Details**
 - ▶ [Query Call Details](#)

BROWSER REQUIREMENTS

The SmartVoice Customer Portal is compatible with all Internet browsers, but Chrome may provide the best user experience. We do recommend that you use the latest version of your Internet browser as you may find some minor incompatibilities with older versions.