



BROADCLOUD ADMINISTRATION PROFESSIONAL

Module 4 - Master Admin Role

MODULE OBJECTIVES



- Understand the BroadCloud Portals and what to use each one for
- Grasp the User Hierarchy for Service Providers
- Be able to move around the BroadCloud Landing Page, understanding what each part is for.
- Be able to state the Master Administrator Unique Abilities

BROADCLOUD PORTALS

BroadCloud Administration Professional

PORTALS

- **Ordering Portal / BroadCloud Portal**
 - Create Orders
 - Create Customers / Users
 - Create Admins
 - Modify Pricing and Descriptions
- REP, My Site / My Account
 - Physical site Programming for the Customer
- My Phone – END USER ONLY
 - End User Programming

TAB CONTROL

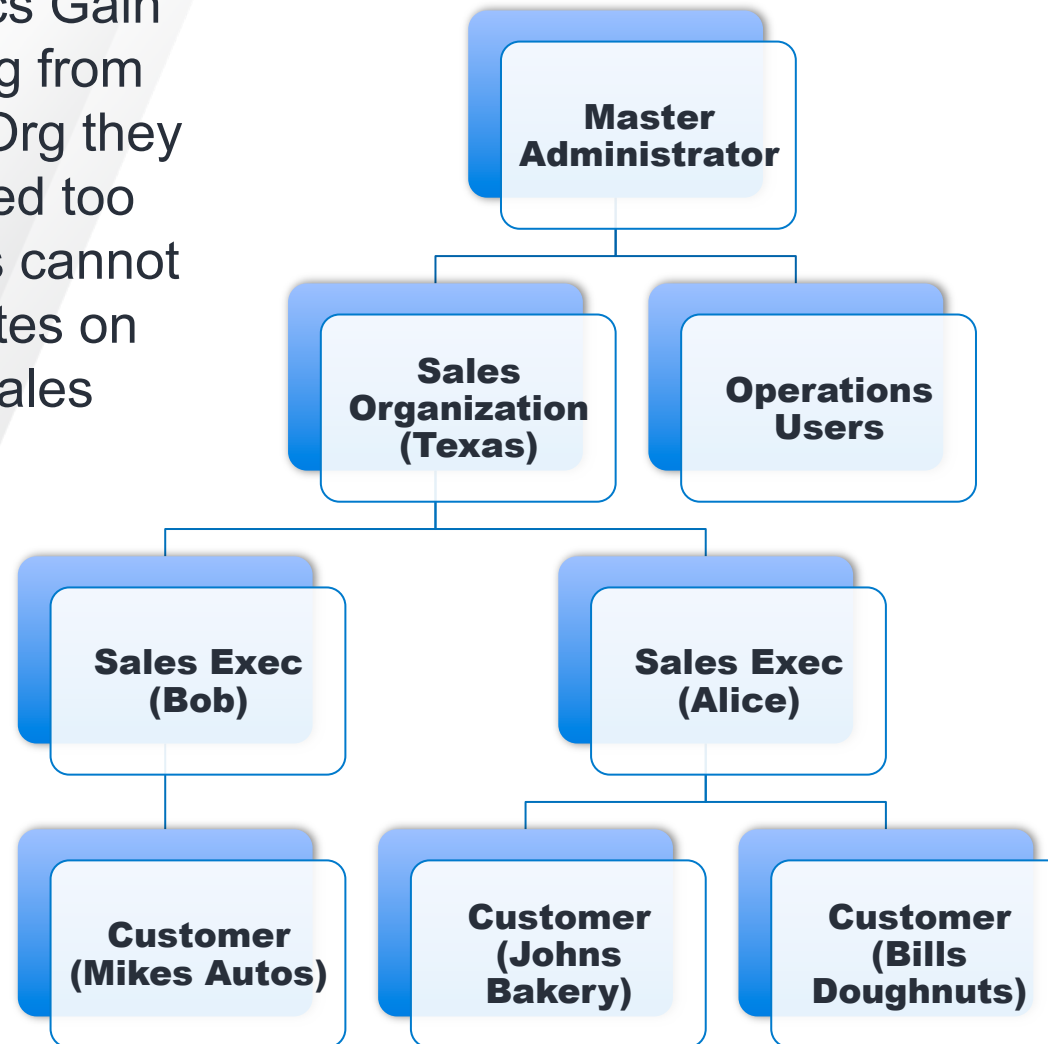
- When using the Portals please do not open multiple tabs when progressing an order through the system.
- It causes you major confusion as to where you are and what you need to do next.
- Plus the information you see on older Tabs is not correct as it has not been reloaded.

USER HIERARCHY

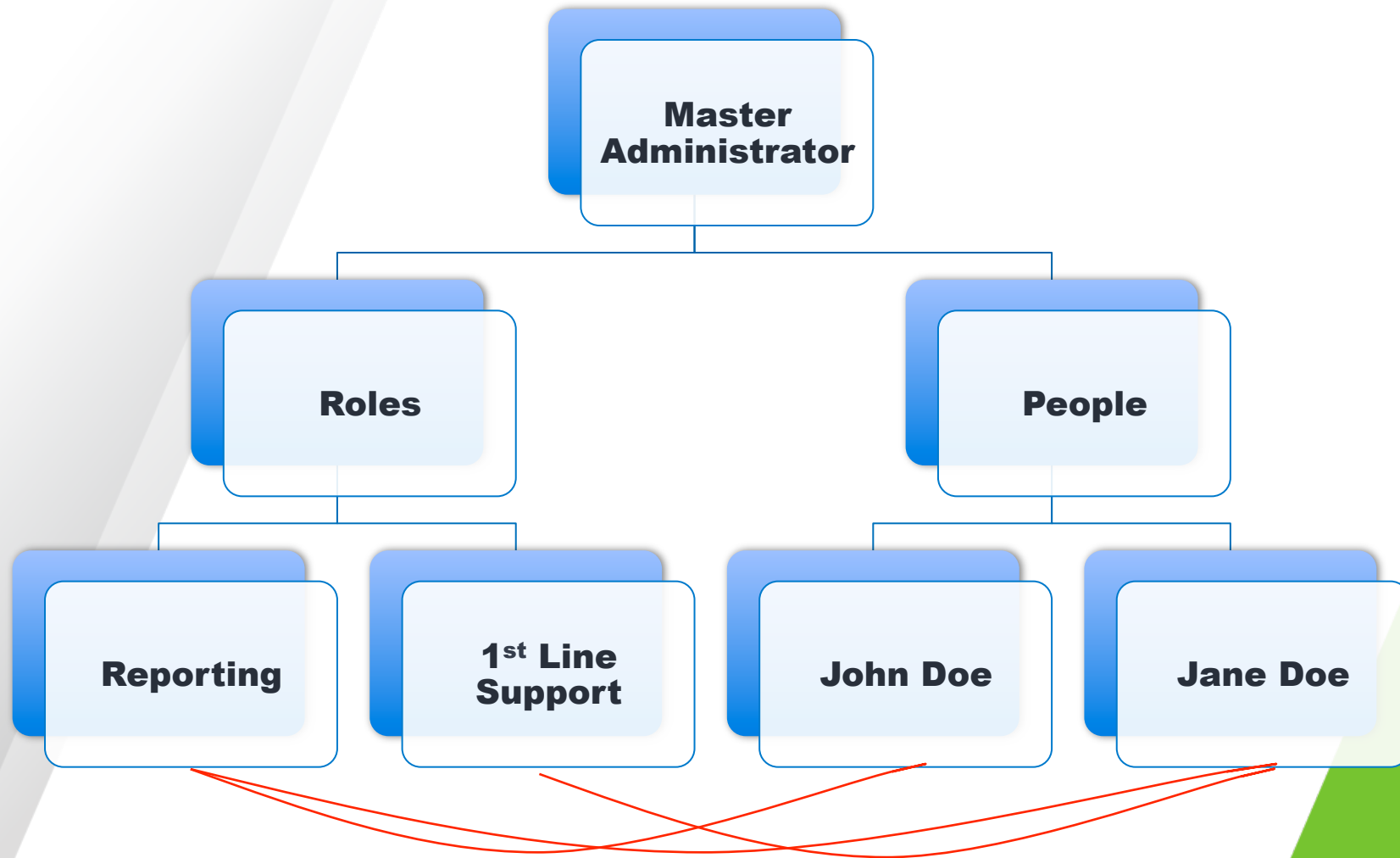
BroadCloud Administration Professional

SERVICE PROVIDER HIERARCHY

- Sales Execs Gain their Pricing from the Sales Org they are assigned too
- Sales Orgs cannot create quotes on behalf of Sales Execs



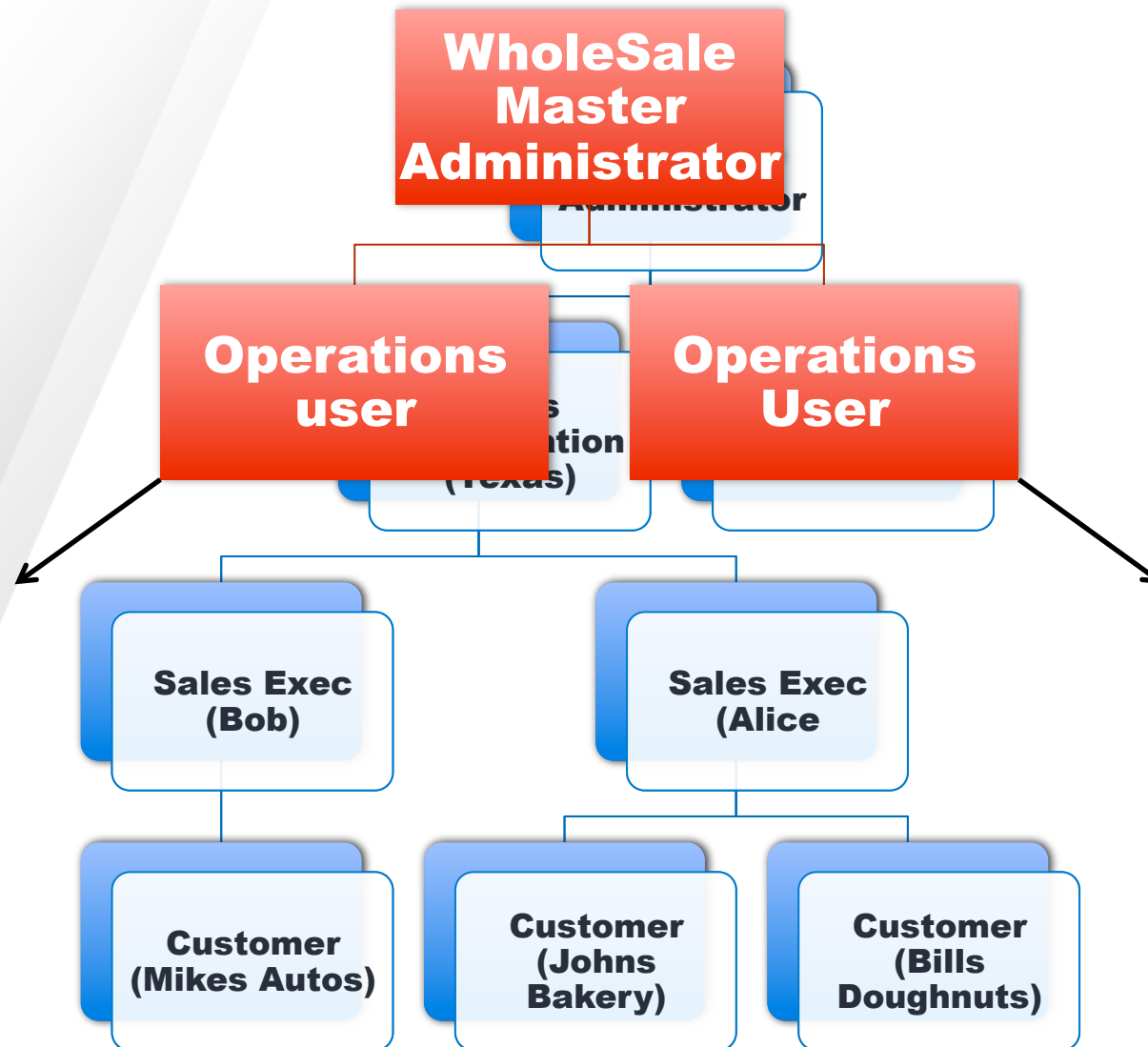
OPERATIONS USERS



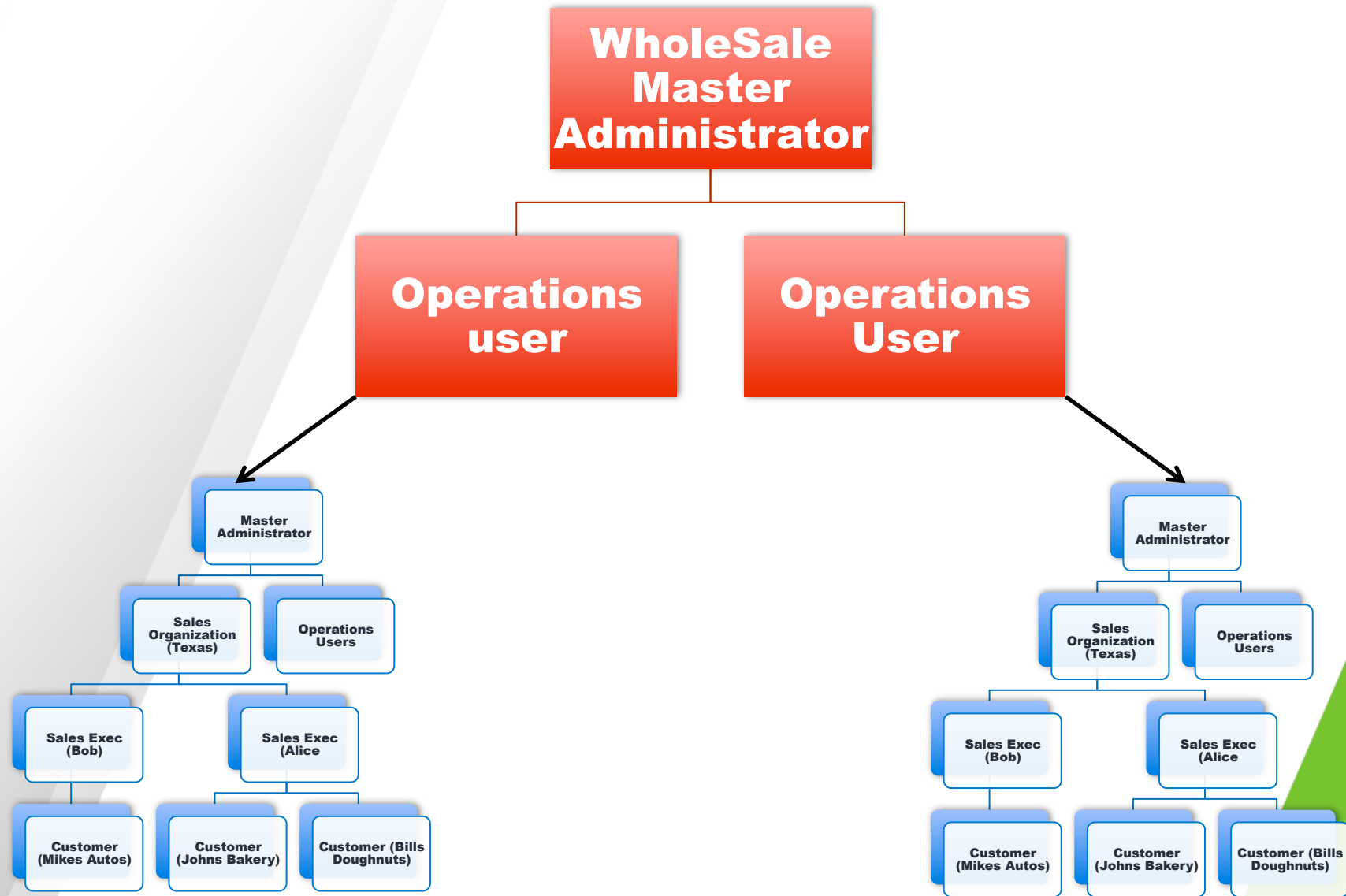
SERVICE PROVIDER HIERARCHY



WHOLESALE PROVIDER HIERARCHY



WHOLESALE PROVIDER HIERARCHY



BROADCLOUD LANDING PAGE

BroadCloud Administration Professional

LOG INTO BROADCLOUD



Login

User Name:

Password:

Login

[Forgot Your Password?](#)

Language - English [Change](#)

<https://cloudcertificationX.broadsoft.com>

LANDING PAGE



Service Provider Portal
Welcome Sales Executive!
Logout

English (United States)

Admin

- Home
- Profile
- Create Customer
- View Customers
- Customer Service Tool

Order

- Create Quote
- Create Field Services Quote
- Pending PMS Interface Scheduled
- Search Quotes
- Search Orders
- Reports

Examinet

- Initiate Request
- View Requests

SipAdvantage®

Sales Action Queue

Orders

- High Priority note(s)
- Unread Note(s)

Quotes

- Click Here

Reporting a Technical Problem?
[SipAdvantage: Support Page](#)

Examinet Requests

No results found

Tools

- Training**
- Sales Collateral**
- Documents**
 - Terms and Conditions
 - LOA
 - Toll Free LOA
- Check Service Availability**

LANDING PAGE

- Sales Action Queue shows notes pertinent to the logins orders and if extra information is required
- ExamiNet Requests panel shows any existing Examinet requests, it show pending, passed and failed.
- The Tools section gives links to various useful information depending on your company set up
- The Admin Panel allows you to create and view customers, including their programming.
- The Order Panel allows Quote creation and order progress searches
- The Examinet Panel allows you initiate and view Examinet Requests for existing customers.

MASTER ADMINISTRATOR UNIQUE ABILITIES

BroadCloud Administration Professional

MY ACCOUNT

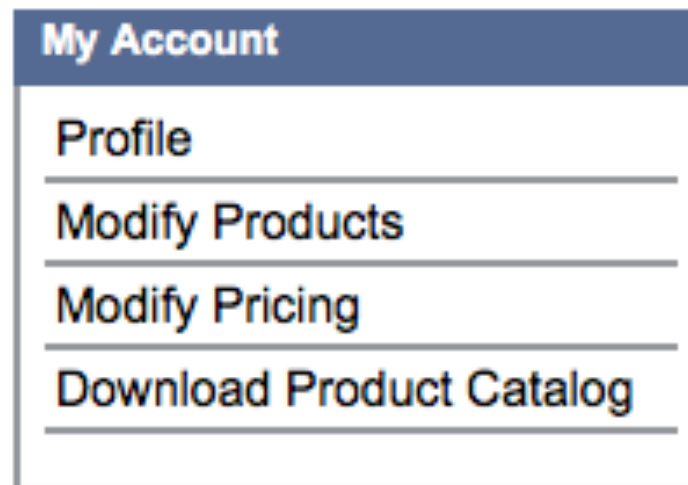
- **Profile**

- Master Agent Info (Username, Pw etc)
- Branding (Email, Portal and fields)

- **Modify Products**

- Change Description of each product from Broadsoft

- **Modify Pricing**



PROFILE

English

Upload:

Choose File no file selected

Upload Image

Master Agent Info

Contact Information

Login

Edit Personal Information

Set up Branding Content

Set up Email Content

Set up Branding Fields

Service Provider:

BroadCloud Training *

Order Complete Email Address:

*

Website:

*

Contract Term Days:

30 *

Business Contact:

Adam North *

Technical Contact:

Adam North *

Logo Image Uri:

/images/adaption/company/default *

Company Logo needs to start with an http:// or you can upload the image by clicking the Browse button and then selecting the image you want to upload and then press the Upload Image button. The Company Logo field will then default to a URL. Please do not remove this URL. If you choose to leave the company logo blank, the logo will be a default logo for the Service Provider. You can upload the logo at a later date.

Save

BRANDING

Name	Attribute	Current	Updated
Hostname	<input type="text" value="http://ustraining.broadcloudpbx.com"/> This is the URL location used to access your branding site. (Ex. officefone.sipadvantage.com)	N/A	N/A
Default From Address	<input type="text" value="customercare@sipadvantage.com"/> (ex. customercare@sipadvantage.com)	N/A	N/A
Company URL	<input type="text" value="https://ustraining.broadcloudpbx.com"/> (ex. https://rialto.broadcloudpbx.com)	N/A	N/A
Product Name	<input type="text" value="Fun Stuff"/> (ex. BroadCloud)	N/A	N/A
Support URL	<input type="text" value="https://www.sipadvantage.com/contact.html"/> (ex. https://www.sipadvantage.com/contact.html)	N/A	N/A
My Phone - Access to Home	<input checked="" type="checkbox"/>	N/A	N/A
My Phone - Access to My Messages	<input checked="" type="checkbox"/>	N/A	N/A
My Phone - Access to My Features	<input checked="" type="checkbox"/>	N/A	N/A
My Phone - Access to My Rules	<input checked="" type="checkbox"/>	N/A	N/A
My Phone - Access to My Numbers	<input checked="" type="checkbox"/>	N/A	N/A
My Phone - Access to My Call History	<input checked="" type="checkbox"/>	N/A	N/A
My Phone - Access to SipFone (Beta)	<input type="checkbox"/>	N/A	N/A
Show Powered by Rialto?	<input checked="" type="checkbox"/>	N/A	N/A

BRANDING

- Hostname – Site Address.
- Default Address – Email return address from the system (Useful to be a monitored Address – Customers may reply to it).
- Company Url – If you select the Logo in the portal, this is where you are redirected too.
- Product Name – What you are called BroadCloud Service
- Support Url – Redirection Link when Support option is Clicked – Mainly in My Phone.
- My Phone Tick Boxes – What is available in the My Phone Website.
- CPNI Account Change Notification – NOT used.

BRANDING CONT

HTTP://HTML-COLOR-CODES.INFO

My Account Branding

☐

a) Logo for MyAccount *

Upload Image:

no file selected

OR Enter a URL



broadsoft

b) Image for the application name *

Upload Image:

no file selected

OR Enter a URL

My Account



c) Header background color *

#FFFFFF

Header Font Color *

#FF0000

d) Background color used behind the tabs *

#FCD98C

e) Header background image (optional)

Upload:

no file selected

Preview

HTML Code

f) Active tab text color *

#FF0000

Active tab background color *

#FDF981

g) Inactive tab background color *

#31580C

h) Inactive tab text color *

#FCD98C

i) Color used for special text *

#131511

BRANDING

Device Fulfillment Branding

RDF Configuration

Do not change this information if orders are created. Doing so will cause failures with CPE fulfillment.

Distributor	<input type="text" value="NETXUSA"/>
User Name	<input type="text" value="MA.ustraining"/>
Password	<input type="password" value="*****"/>
Shipper	<input type="text" value="UPS"/>
Default Shipping Method	<input type="text" value="GROUND"/>
Provisioning Template Group Name	<input type="text" value="Default Group"/>
Provisioning Template Provider Name	<input type="text" value="BroadSoft - Adaption, Inc."/>
Shipping Signature Required	<input type="text"/>
Payment	<input type="text"/>

Extra Product Id

[Cancel](#)

[Save](#)

[Preview My Account](#)

Details must be entered here to allow Rialto to automatically place the orders.

EMAIL BRANDING

Email Branding

* Note: Values indicated in with a dollar sign and brackets are dynamic variables. You may remove these variables, but you cannot add more. The list of variables that can be used for each email communication are underneath the Branding Name.



Common Email Elements

On



SP Installation Emails

On



Pending LOA Emails

On



Shipping Emails

Shipping Subject Line

List of Variables that can be used.

`$(companyName)`
`$(productName)`
`$(customerName)`
`$(mainContact)`
`$(mainLink)`
`$(supportUrl)`
`$(salesAgentName)`
`$(todayDate)`
`$(orderId)
$(siteName)`

`$(productName)` - Shipment Confirmation for Order#: `$(orderId)`
(`<$(customerName), $(siteName)>`)

Preview

Fun Stuff - Shipment Confirmation for Order#: *WS10000*
(*Customer*, *Site Name*)

Shipping Body

List of Variables that can be used.

`$(companyName)`
`$(productName)`
`$(customerName)`
`$(mainContact)`
`$(mainLink)`
`$(supportUrl)`
`$(salesAgentName)`
`$(todayDate)`
`$(orderId)
$(carrierInfo)`
`
$(trackingInfo)
$(itemsShipped)`

Dear `$(customerName)`,

Your shipment for order id
`
$(orderId)</br>` is currently on the way. For your reference the
shipment details and tracking number(s) are below.

<code><u>Carrier(s)</u></code>	<code><u>Tracking Number(s)</u></code>
<code>*UPS*</code>	<code>*ABC*</code>
<code>*UPS*</code>	<code>*XYZ*</code>

`
$(itemsShipped)`

Preview

Dear *Customer*,

Your shipment for order id ***WS10000*** is currently on the
way. For your reference the shipment details and tracking
number(s) are below.

Carrier(s)	Tracking Number(s)
UPS	*ABC*
UPS	*XYZ*

*Product Name	Qty
Cisco SPA502G w/ Power Supply	2
Polycom SoundPoint IP 650 VoIP Phone Station w/HD Voice	3*

Anything written in the email must be written in
HTML, the items in green are the variables

BRANDING FIELDS

Service Provider Customer Fields						
Field	Value	View?	Required on Entry?	Required on Pending BAN?	Contract Field?	Required on I
SP Customer Id 1	Billing Telephone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
SP Customer Id 2		<input type="checkbox"/>				
SP Customer Id 3		<input type="checkbox"/>				
SP Site Id 1	Global ID Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
SP Site Id 2	test	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
SP Site Id 3		<input type="checkbox"/>			<input type="checkbox"/>	
SP Order Id		<input type="checkbox"/>				
SP Order PO Number		<input type="checkbox"/>				

Tools			
Name	Value	View?	Default
Has Training Material on Sales?		<input checked="" type="checkbox"/>	http://broadsoft-xcelerate.talentlms.com/
Has Sales Collateral on Sales?		<input checked="" type="checkbox"/>	https://rv.roinnovation.com/broadsoft/HomeV3.aspx
Has Documentation on Sales?	N/A	<input checked="" type="checkbox"/>	N/A
Has Tools on Sales?		<input checked="" type="checkbox"/>	

VPN Branding Setting				
Field	Value	View?	Required on Order Submission?	Required on Pending VPN Setup?
SP VPN 1		<input type="checkbox"/>		
SP VPN 2		<input type="checkbox"/>		
SP VPN 3		<input type="checkbox"/>		
SP VPN 4		<input type="checkbox"/>		
SP VPN 5		<input type="checkbox"/>		
SP VPN 6		<input type="checkbox"/>		
SP VPN 7		<input type="checkbox"/>		
SP VPN 8		<input type="checkbox"/>		
SP VPN 9	Router-Router Network-DL	<input type="checkbox"/>		
SP VPN 10	Router-Router Network-CH	<input type="checkbox"/>		
SP Customer ASN			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Router-Router VLAN			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save

Extra Information gathering fields can be added into the order process at various stages. They can be made optional or Mandatory and only visible at certain points in the process.

MODIFY PRODUCTS

Edit Product Catalog

Edit Product Categories

Site Package	Edit
Hosted PBX Products	Edit
Devices	Edit
Optional Devices	Edit
Office Trunk Devices	Edit
Office Trunk Optional Devices	Edit
Phone Number Packages	Edit
Change Orders	Edit
Hosted PRI - Site Package	Edit
Hosted PRI	Edit
Move Orders	Edit
Device Rentals	Edit
Optional Device Rentals	Edit
Trunk Device Rentals	Edit
Optional Trunk Device Rentals	Edit
Service Provider Installation Services	Edit
Sip Trunking	Edit
Hospitality	Edit
Site Package - Hospitality	Edit
Site Package - Sip Trunking	Edit
Caller Id	Edit

Type

[Edit](#)

Hosted PRI Site
Sip Trunking
Hospitality
Hosted PBX Site

Station Type

[Edit](#)

Auto Attendant
Basic Admin
Basic Station
Call Center Agent
Call Center
Call Center Supervisor
Hosted PRI - Call Path
Call Queue
Call Queue Agent
Premium User Station
Group Paging
Guest Room
Hosted Square Key 12 Lines
Hosted Square Key 2 Lines
Hosted Square Key 4 Lines
Hosted Square Key 8 Lines
Hosted PRI User
Hunt Group
BroadCloud UC-Desktop with Lync I
Meet-Me Bridge
Meet-Me Conference
Messaging Station
Music On Hold
None
Office Anywhere Portal
Hosted POTS Line
Premium Admin
Call Recording
Standard Admin
Toll Free

Anything in a “Types” List is just a name change of the service – Click on Edit, change the required name, and save

MODIFY PRODUCTS CONT.

Edit Product Catalog

Headsets and Other Accessories

Edit

Product Name	Image Url	Product Description	Long Description
<input type="text" value="PacketSmart PI-500"/> Product ID: <input type="text"/> Service Name: <input type="text"/>	<p>Upload Image:</p> <p><input type="button" value="Choose File"/> no file selected <input type="button" value="Upload"/></p> <p>OR Enter a URL</p> <p><input type="text" value="/images/broadsoft/products/15-P"/></p>	<input type="text" value="PacketSmart PI-500 Monitoring Appliance"/>	<input type="text" value="Network monitoring device providing state of the art network assessment and monitoring to insure customers WAN/LAN is performing to the desired standards relating to Quality of Service, in addition to providing detailed information in real time environment for enhanced trouble resolution.

The PI 500 specifications include;
 - VGA and external monitor display
- 10/100/100 Network Interface Speed
- SIP-over-UDP and SIP-under-TCP VoIP protocol"/>
<input type="text" value="Packetsmart PI-500 w/ Warranty"/> Product ID: <input type="text"/> Service Name: <input type="text"/>	<p>Upload Image:</p> <p><input type="button" value="Choose File"/> no file selected <input type="button" value="Upload"/></p> <p>OR Enter a URL</p> <p><input type="text"/></p>	<input type="text" value="Packetsmart PI-500 w/ Warranty"/>	<input type="text" value="Packetsmart PI-500 w/ Warranty"/>

Preview

- Upload an image is used when an item is selected to view.
- Product Description is the mouse over description
- Long Description is used when an item is selected to view.

MODIFY PRICING

English

Modify Pricing - Hosted PBX Products

View Sales Organizations

Services	One-Time Fees			Monthly Fees			View?
	Suggested List Price	Minimum Sales Price	List Price	Suggested List Price	Minimum Sales Price	List Price	
Hunt Group	\$0.00	\$0.00	\$ <input type="text"/>	\$7.95	\$0.00	\$ <input type="text"/>	<input checked="" type="checkbox"/>

Back

Cancel

Continue

One time fees – setup fess

Monthly fees – reoccurring each month

View – can the one time fees be seen in the order at a Sales Executive level

CLASS LAB 1 GUIDED

BroadCloud Administration Professional

CREATE A SALES ORGANIZATION

Organization

Organization Name:

Contact Name:

SP User Code:

Email Address:

Phone Number:

Single Billing Account Number for all Customers? ☐

Sensitive ☐

Comments:

Login

User Name:

Operations Users

Operations Users

Available

Adam North
Alex Vergilis
Bradley Fennell
Bradley Fennell
Brent Helphenstine
Brian Lenz
Carrie Molak
Carrie Molak
Catherine Cardillo
David Hugdahl



Current

Cancel

Save

CREATE A SALES EXECUTIVE

Owner	
Owner:	<input type="text"/> *
User Information	
First name:	<input type="text"/> *
Middle initial:	<input type="text"/>
Last name:	<input type="text"/> *
SP User Code:	<input type="text"/>
Mailing/Shipping Address	
Address Line 1:	<input type="text"/> *
Address Line 2:	<input type="text"/>
City:	<input type="text"/> *
State/Province:	<input type="text" value="Alabama"/> *
Zip/Postal Code:	<input type="text"/> *
Country:	<input type="text" value="United States"/> *
Phone Numbers	
Business phone:	<input type="text"/> *
Fax Number:	<input type="text"/>
Mobile Phone Number:	<input type="text"/>
Home phone:	<input type="text"/>
E-Mail Address	
Email Address:	<input type="text"/> *
Login	
User Name:	<input type="text"/> *
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

REVIEW QUESTION

- What are the two types of BroadCloud Service?
 - Reseller
 - Distributor
- What do Sales Execs get from their assigned Sales Org?
 - Pricing
- What is the order to create a Ops User?
 - Create Role
 - Create User
 - Assign Role and Sales Org

REVIEW QUESTION

- What is the color format required to enter a color in branding?
 - HTML
- Can you preview an email before it is sent by the system?
 - Yes
- What is the difference between Product Description and Long Description?
 - Product Description is used for mouse over and Long Description is used when the item is actually clicked on in Quote entry.

MODULE OBJECTIVES WRAP



- Understand the BroadCloud Portals and what to use each one for
- Grasp the User Hierarchy for Service Providers
- Be able to move around the BroadCloud Landing Page, understanding what each part is for.
- Be able to state the Master Administrator Unique Abilities

THANK YOU!