FUSION MICROSOFT VOICE PORTAL (MVP) USER GUIDE

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Managing Services Through the Teams Calling Automation Platform – "Operator Connect"

The Microsoft Voice Portal (MVP) is a Fusion portal designed to remove the complexity of provision and configuring services to Teams users and Resources.

To view the following guide's Fusion Connect MVP/Operator Connect Portal Overview video: **CLICK HERE**

Managed Services At-a-Glance

Portal User Administration
Operator Connect provides customers the option to manage portal users. Multiple admins can be created, and user permissions may be set based on customer needs.

DID Management
Operator Connect handles every aspect of number management, making it easier for you to request, assign, and monitor numbers. Users can assign manage numbers from their pool as well as request new numbers directly from the portal.

Resource Account Creation
Resource accounts are typically created within the Microsoft Teams Admin Portal. Operator Connect provides a quick and easy way for customers to create new Resource accounts and associate a call flow with the Resource account.
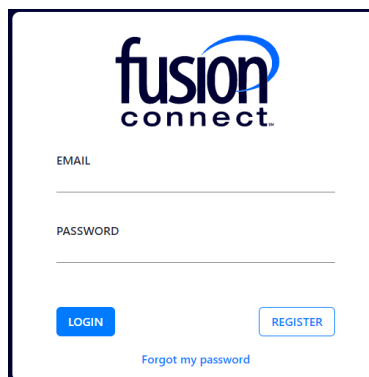
Trigger Manager
To ensure customers are aware of changes made to their services, Operator Connect allows users to create and manage triggers based on actions done directly within the portal.
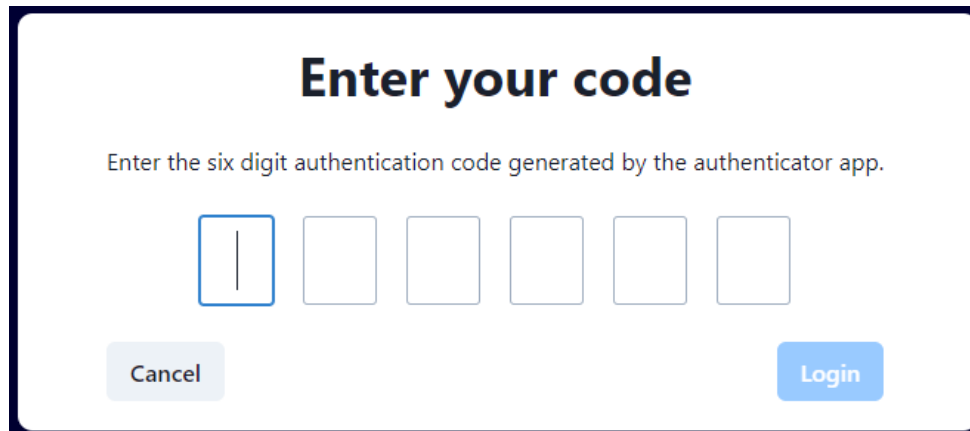
Logging Into the Microsoft Voice Portal

To login to MVP, you'll need a username and password. User credentials will be created upon initial registration. To log in, input your user credentials into the login page:

The Portal Link: https://uc.fusionconnect.com/ui

Because we want to ensure your connection to Operator Connect is secure, Multi Factor Authentication (MFA) is required. Users will be forced to input a six-digit authentication code before gaining access to the portal when logging in.
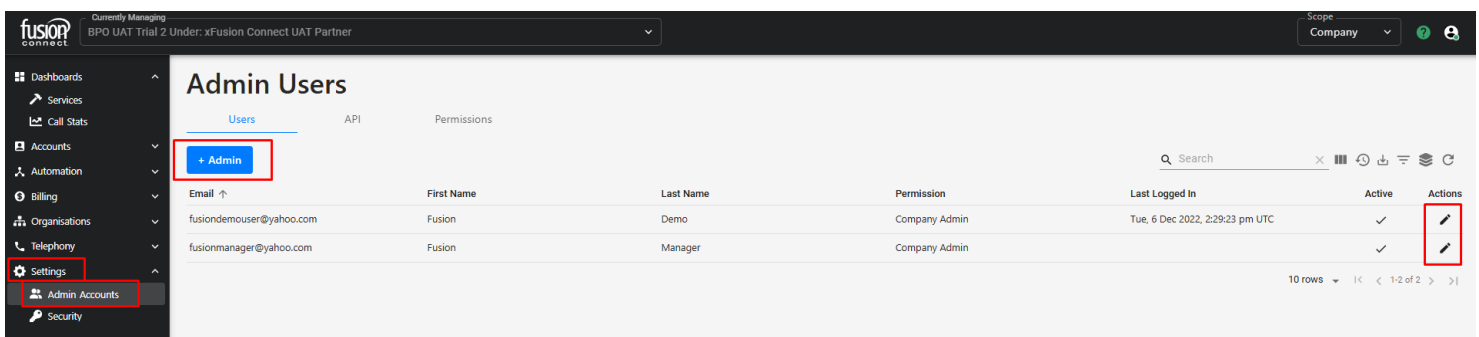
*Please follow the prompts provided upon initial setup to establish MFA.

Portal User Administration

Microsoft Voice Portal (MVP) / Operator Connect provides Admin users with *Company Admin* privileges the ability to manage other Portal Users/Admins. To manage users, go to your **"Admin Accounts"** option under the *Settings section*. Once under the Admins Accounts section, you can ADD new users, EDIT existing user details *(by clicking their pencil icon to the right),* and/or DELETE users.

Adding Administrative Users

To add an Admin user to the account, select the **"+ Admin"** button. Once selected you will be prompted to provide the following user details.

First Name:
Last Name:
Email:
Permission Set:
      Company Admin-   *Provides the capability to manage all services within the portal.*
      Company Reviewer-   *Provides the option to view all service information within the portal*
Configure MFA: Is automatically set to On. *Note: This option cannot be changed. For security purposes, all Portal users are required to have MFA enabled.*
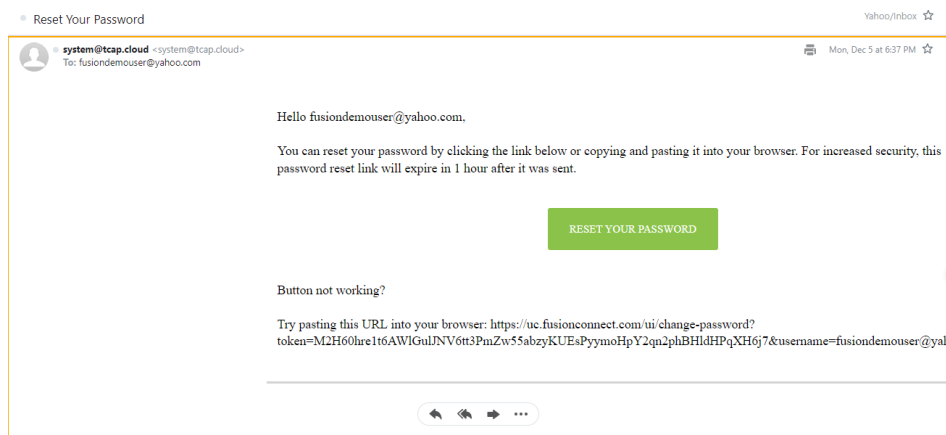

Once you select **"SAVE"**, the new user will be created and sent an email to complete the setup for their Portal profile. The email will come from "Systems@tcap.cloud" and require you to do to the following:

1. Establish a password
2. Setup Multi Factor Authentication (MFA)

The user will be listed under the Admin Accounts list once it is created.

Editing Administrative Users

To edit an administrative user, select the pencil icon under the action section for the user you would like to manage.

Once in the user, you can edit any of the Admin's existing information and select **SAVE** to save your edits.

Deleting Administrative Users / Reset Password

To **Delete** an Admin user or **Reset Password**, *(referencing the above screen capture),* when editing an Admin …in the Manage Admin User Access section, you can select *"Delete" or "Reset Password"*, then click **"Save"** to save changes.

Direct Inward Dialing (DID) Numbers Management

Operator Connect oversees every aspect of number management, making it easier for you to request, assign and monitor numbers. Users can assign and manage numbers from their pool as well as request new numbers directly from the portal.

Assigning DIDs To Users and Resources

Fusion will upload all numbers to your Portal for you to manage.

- New Numbers are available and ready to assign and use as soon as they are uploaded to the portal.
- Porting numbers are uploaded to the portal but will not be able to receive inbound calls until the port is complete. This is to allow user the opportunity to assign the numbers to users and resources prior to porting to minimize downtime.

Viewing Your Pool of DIDs

All DIDs may be viewed in the "Numbers" section. All numbers will come in with the following per TN:

- Each telephone number will reflect its own DID as the outbound Caller ID. (This may be updated to reflect another DID)
- All telephone number will come in unassigned to a trunk or user. Assigning a trunk and a user will make the telephone number operable if it is managed by Fusion.

If a number is already assigned to a trunk, it will reflect in the trunk section. If it's already assigned to a user, a username will reflect in the user section.
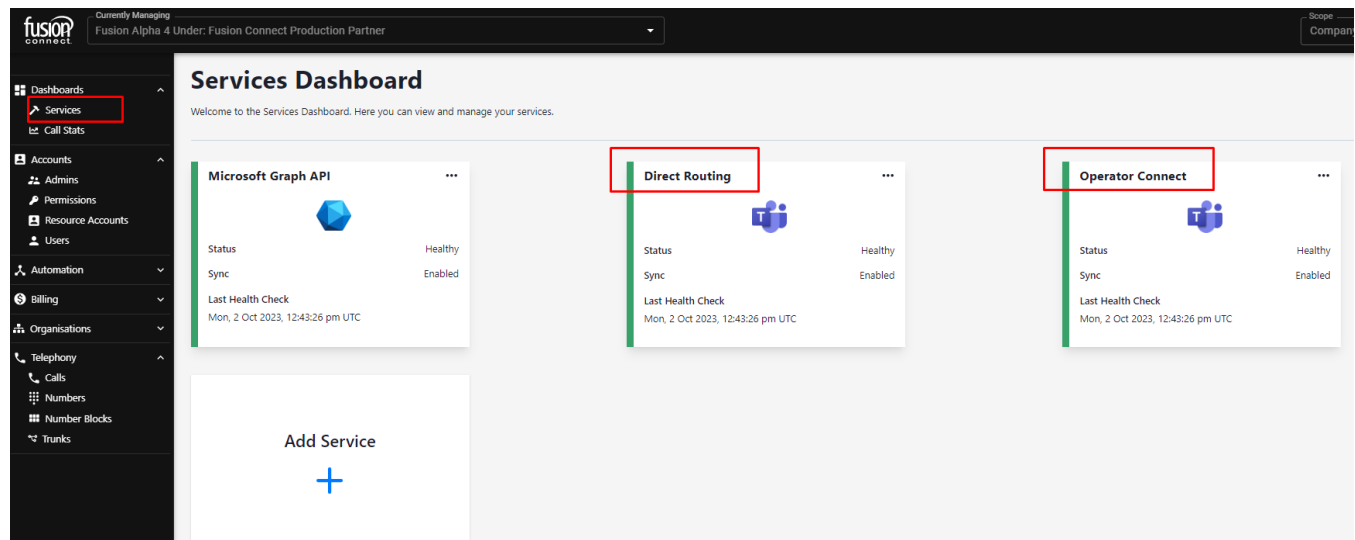
Assigning Numbers to a Trunk

BILLING DISCLAIMER:* Assigning Telephone numbers to an *Operator Connect (OC) Trunk* OR a *Direct Routing (DR) Trunk* "activates" your number in Fusion Connect Billing, hence you will incur a billing change on your account. *You are responsible for the changes you make within your Portal including costs incurred due to number activation. Please view your contract for all billing terms.

Once numbers are uploaded, for Billing purposes **they must be assigned to a Trunk before it can be assigned to a User**.

There are (2) service option types for assigning TRUNK(s) – **OC (OPERATOR CONNECT), and DR (DIRECT ROUTING).** When assigning a number to a Trunk, your Trunk option(s) depend on which service type you have.

Note: To verify which type of service you have, click your "Services" option under Dashboard. You'll have *"Operator Connect", "Direct Routing" or both*. Below is an example of both- Operator Connect and Direct Routing:

Assigning a number to an <u>OC (OPERATOR CONNECT Trunk)</u>:

Under *Telephony*, click on "Numbers". To assign a number to a Trunk, click on the Action Icon *(pencil)* next to the number you would like to assign. Once in the *Edit Number* page, assign your Operator Connect trunk to activate it. Doing so will either pull from our Operator Connect Call Paths we are contracted for or increase the number of call paths you are billed for based on the amount of telephone numbers assigned to trunks during that billing cycle.

Ensure you select the **MS Operator Connect Trunk** type if you are activating the number to be assigned to a User for Operator Connect *(see picture on the next page):*

Assigning Numbers to a Calling Profile

In addition to assigning your number(s) to Trunks, you'll need to assign your number to an Operator Connect *CALLING PROFILE*. Calling Profiles are geographical locations/areas of the world that your number(s) will reside in. Below is a world map detailing the various Calling Profile locations:
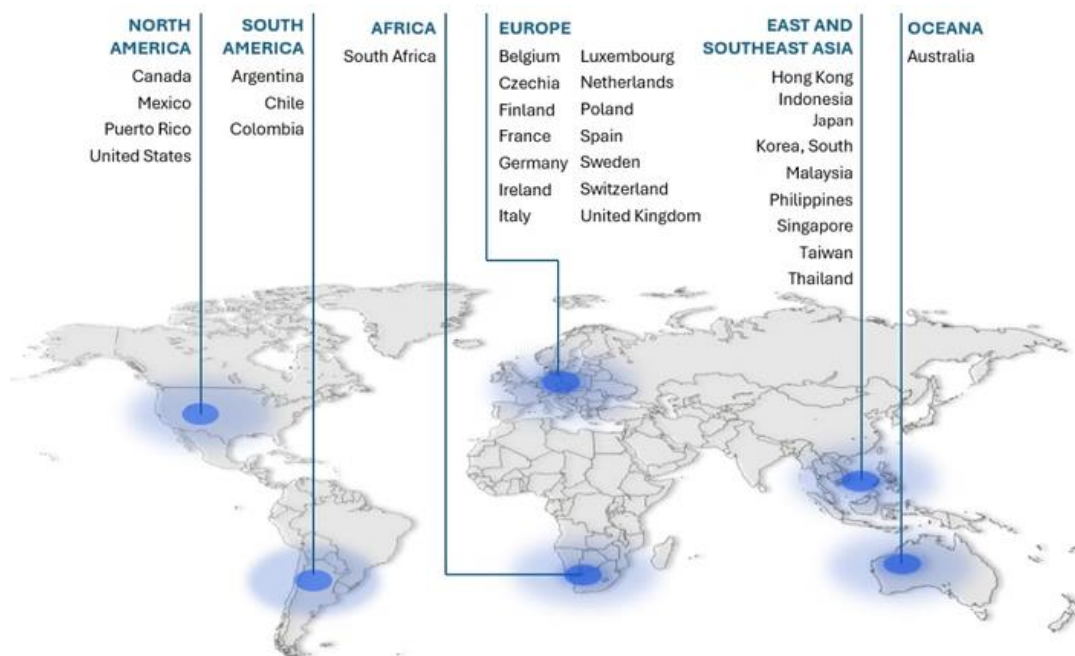
Choose a **_Calling Profile_** from the drop-down list:

Assigning Operator Connect Telephone Number Usage

Lastly, you need to add a **_Number Usage Assignment_** for your telephone number(s). To do this, under _"Operator Connect Telephone Number Usage"_, choose from the drop-down either:
- <u>Calling User Assignment</u>: If your number will be assigned to a USER
- <u>First Party App Assignment</u>: If your number will be assigned to a Resource Account _(such as an Auto-Attendant, Call Queue, etc)_

***Once you assign your **_Trunk_**, choose a **_Calling Profile_**, and choose your **_Number Usage_** option **…CLICK SAVE**. *** You have now assigned a number to your Operator Connect (OC) Trunk.

Assigning a number to a DR (DIRECT ROUTING Trunk):

To assign a number to a *DR (Direct Routing) Trunk*, under *Telephony*, click on "Numbers". Beside the number to the right, click on the Action Icon *(pencil)* of the number you would like to assign. Once in the *Edit Number* page, assign your DR (Direct Routing) Trunk to activate it. Doing so will now bill the amount of telephone numbers assigned to your trunk(s) during that billing cycle.

Ensure you select the **MS Direct Routing Trunk** type if you are activating the number to be assigned to a User for Direct Routing. Click **SAVE CHANGES** to assign your number to your DR (Direct Routing) Trunk*:*

The telephone number will now reflect the specific trunk with a status of "Pending Update". This will be the status until the trunk fully provisions to the number. Once the number is fully provisioned on the trunk, the status will change to "OK".

Updating Outbound Caller ID Number

The outbound caller ID numbers can be managed per telephone number directly from within Operator Connect. Upon initial configuration, the telephone being activated will serve as the default caller ID number unless changed. To manage an individual user, select the Icon under the Action section for the telephone number. Once in the telephone number, select the telephone number you would like displayed as the outbound caller ID from the "Outbound Caller ID" field and select Save Changes. Only numbers that are managed within Operator Connect can be selected as an option.

Unassigning Trunks from Telephone Numbers

To unassign a number from a trunk, go into the telephone number you want to manage and change the Trunk field to "Not Allocated" and select Save Changes.
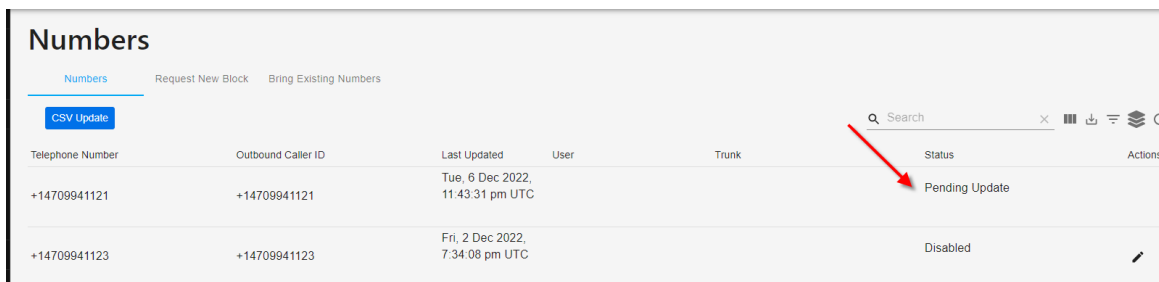
The status will change to "Pending Update" once the change is initiated and turn to Disabled once the trunk is removed from the number.   This may take up-to 24 hours.

Managing Numbers in Bulks

You may also want to update numbers in bulk. To do this, select the CSV Update icon.

*If you are assigning numbers to trunks, we recommend that you assign at least one number to a trunk before you download the file so that you can apply it to other numbers on the spreadsheet.
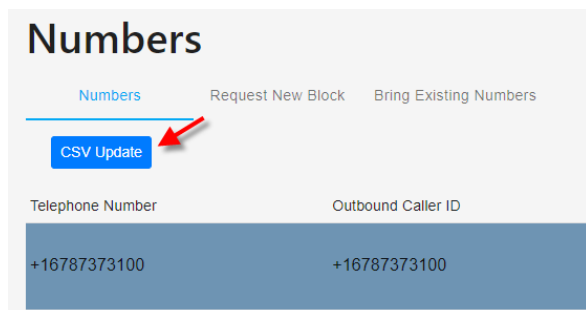
Once you do that, select Download to obtain the CSV file with all your numbers on it.

Once the File opens, copy the Trunk, Operator Connect Calling Profile and Operator Connect Telephone Number Usage columns to the respective columns for the telephone number(s) you would like to update.

NOTE: When IMPORTING NUMBERS in bulk, please adhere to the following *CSV formatting* guidelines…

Make sure all number columns (such as **Telephone Numbers**, **Outbound Caller ID**, and **Overstamp Number** are all formatted correctly to show the actual number being Imported. Excel may format International numbers differently (example below):

Formatting showing *(correct)*:

Formatting showing *(NOT correct)*:

If showing not correct (see above), convert the number columns to "NUMBER" (without decimal points) and then they can be fully viewed and saved. Just be careful, if ever opening the file again, you must repeat this step!

Example below is the FORMATTED SAVE attachment:

Once you have all (3) number columns properly formatted, save the file with all the updates and upload it to Operator Connect by selecting the Choose file options.

The system will automatically validate the file. Once validated, select View results to ensure the file took.

If the changes are valid, you will geta a result of "Passed". If there was an issue, you will get a result of "Fail" and none of the items will update.

CSV Validation

Passed ✓ ← This will reflect Pass if your changes are valid and Fail if not.

Telephone Number	Outbound Caller ID	Trunk	Calling Profile	Usage ID	Custom Attribute 1	Custom Attribute	Change Status	ute 3	Verification Status
18884240511	18884240511	wb5k20p5v-ocmx2c8n.oc.core.tcap.cloud	DEV_Intrado_Calling_AC_NOAM_TCAP	CallingUserAssignment					Success.
16787373100	16787373100	wb5k20p5v-ocmx2c8n.oc.core.tcap.cloud	DEV_Intrado_Calling_AC_NOAM_TCAP	CallingUserAssignment					Ignored, no changes detected.
16787373101	16787373101								Ignored, no changes detected.
16787373102	16787373102								Ignored, no changes detected.

50 rows ▾ |< < 1-4 of 4 > >|

Select Import to process your changes. Once you select Import, it will show you the results of your import.

Importing CSV...

✓ Completed

Successful : 1

Failed : 0

No Change (Ignored): 3

View Results →

If all took, the quantity associated with failed will be 0. To see the numbers affected by your import select "View Results".   We recommend that you review the Number section to make sure that were changed all show a status of OK. If there are issues, please contact the support group to help resolve your issue.

Managing Users

To assign a number to a user, go to the User section under Accounts. All users created within the Microsoft tenant will display in Users section.

Identifying Telephone Number Status

Each telephone number will have information associated with it. Please see a list of the columns below along with a description of the item.

Display Name:	This is the First and Last Name associated with the user in the Teams admin portal.
Activate:	Status of the user in the MS Teams admin Portal.
Status:	This indicates if the items applied in Operator Connect associated with the number is active.
UPN:	This is the email address associated with the user.
Telephone Number:	Telephone number associated with the user or licenses status if no telephone numbers are assigned. If the customer has the correct licenses assigned to associate a telephone number to it, it will have a status of "Not Allocated".

If the customer does not have the correct status associated with it, it will have a status of "**Not Licensed**". If you would like to assign services to the customer within Operator Connect, it needs assigned the appropriate licenses to the user within the Teams admin portal.

Dial Plan: Dial plan associated with the telephone number assigned to the user.

Voice Policy: Voice Policy associated with the telephone number assigned to the user.

Usage Location: The location associated with the user identified at the time of user creation.

Managed By: This identifies if a user is managed within the Operator Connect Portal (if choosing - TCAP) -or by another provider (if choosing - OTHER).

Note: For the "Managed BY" column: If *Managed By TCAP* is chosen, all settings and provisioning for users will be pulled from the MVP/Operator Connect Portal. This means if you make a change directly in your Teams Admin Tenant, such as assigning a number to a user, MVP will take precedence over changes made in your Teams Admin Tenant and unassign any services/numbers that may have been previously assigned in your Teams Admin Tenant.

If *Managed By OTHER* is chosen, all service provisioning for users must be done directly in your Teams Admin Tenant.

Action: Option to edit the individual telephone number.

Display Name ↑	Active	Status	UPN	Telephone Number	Dial Plan	Voice Policy	Usage Location	Managed By	Actions
TCAP Admin	✓	●	tcap.teams@FCOCUAT1.onmicrosoft.com	Not Licensed		⊘	AU	TCAP	✏️
Teams Admin	✓	●	admin@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	GB	TCAP	✏️
User 1	✓	●	User1@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 2	✓	●	User2@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 3	✓	●	User3@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 4	✓	●	User4@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 5	✓	●	User5@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 6	✓	●	User6@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 7	✓	●	User7@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 8	✓	●	User8@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️
User 9	✓	●	User9@FCOCUAT1.onmicrosoft.com	Not Allocated	Not Allocated	Not Allocated	US	TCAP	✏️

50 rows | |< < 1-11 of 11 > >|

Licensed: 10 Users   Numbers assigned: 0 Users   Σ 11 Users

Users

CSV Update   Sync Users   ?

Assigning Telephone Numbers to Users

For a telephone number to receive a call, it must be assigned to a user -or a resource account. Before a number can be assigned to a user, ensure that it has been assigned to either an *Operator Connect Trunk* -OR a *Direct Routing Trunk*. *(Please reference the Assigning Numbers to a Trunk section above).*

Adding an <u>OPERATOR CONNECT</u> Trunk number to a USER:

Select the Actions icon to go into the user you would like to assign a number to. Once inside the user, select the number you would like to assign to the user from the dropdown list under the "Number" section. Only Numbers that show assigned to a trunk should be assigned. These will reflect *MS Operator Connect* beside the number:

Click **SAVE CHANGES** to process your changes. Once you select save, you route back to the Users section. The user that was modified will show a light green dot beside the user. This means that the changes that are being applied are currently in progress. Once the changes take, the light green dot will change to dark green. Although the changes may take within 15 minutes, allow up to 24 hours for the services to propagate through Microsoft's systems. (Error instructions)

Adding a <u>DIRECT ROUTING</u> Trunk number to a USER:

Select the Actions icon to go into the user you would like to assign a number to. Once inside the user…

- **For _Number_**, select the number you would like to assign to the user from the dropdown list under the "Number" section. Only Numbers that show assigned to a trunk should be assigned. These will reflect _MS Direct Routing_ beside the number:

- **For _Voice Policy_**, select the correlating Voice Policy from your dropdown list. Note: Choosing an International Policy allows that number to dial Internationally:

- *For <u>Dial Plan</u>*, select the standard Dial Plan from your dropdown list. Note: Your list of Dial Plans should correlate with the same region as your Voice Policy section above:

Click **SAVE CHANGES** to process your changes. Once you select save, you'll route back to the Users section. The user that was modified will show a light green dot beside them. This means the changes are being applied / are currently in progress. Once the changes take effect, the light green dot will change to dark green. Note: Changes may take place within 15 minutes, however allow up to 24 hours for the services to propagate through Microsoft's systems. (Error instructions)

Editing Telephone Numbers Assigned to Users

To remove a number from being assigned to a user, go to the action ICON for the user and change the Number column to "Not Allocated".
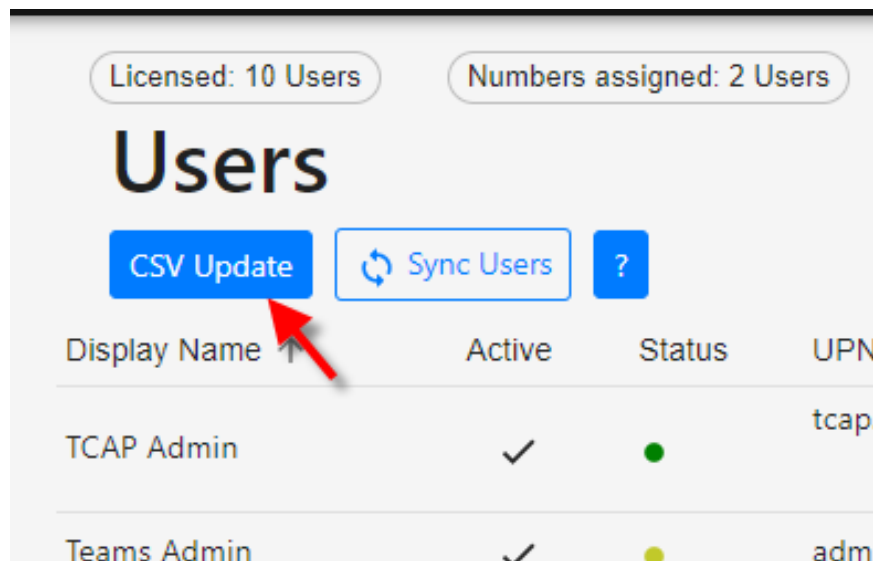
If you would like to modify the telephone number assigned to a user, select the new number you want assigned and select Save Changes.

Managing Assigning Numbers to Users in Bulk

To assign numbers in bulk, select the "CSV Update" link.

Download the CSV file. Doing this will export all users associated with the Operator Connect account.

In the CSV file, assign the telephone number from your list of numbers provided in the Operator Connect Portal to a user that does not have a telephone number status of Not Licensed. As a reminder, the number must be assigned to a trunk to be able to be assigned. The numbers must have the country code in front of them. (Do not include the + sign)

NOTE: When adding numbers to Users in bulk, please adhere to the following **CSV formatting** guidelines…

Make sure your **Telephone Number** column is formatted correctly to show the actual number being added. Excel may format International numbers differently (see below):

Formatting showing *(correct)*:   Formatting showing (<u>NOT</u> *correct)*:

If showing not correct (see above), convert the number columns to "NUMBER" (without decimal points) and then they can be fully viewed and saved. Just be careful, if ever opening the file again, you must repeat this step!

Once you have your number column properly formatted, save the file with the updates, and upload it to Operator Connect by selecting the Choose file option:

The system will automatically validate the file. Once validated, select View results to ensure the file took.

If the changes are valid, you will geta a result of "Passed". If there was an issue, you will get a result of "Fail" and none of the items will update.

Select Import to process your changes.   Once you select Import, it will show you the results of your import.

If all took, the quantity associated with failed will be 0. To see the numbers affected by your import select "View Results".   We recommend that you review the Number section to make sure that were changed all show a status of OK. If there are issues, please contact the support group to help resolve your issue.

Assigning Numbers to Resource Accounts

Resource accounts require telephones to receive calls like your users. The same methods you use to assign numbers to users should apply to assigning numbers to resource account with the exception that you cannot assign numbers to Resource Accounts in bulk.   To assign numbers to resource accounts, go to "Resource Accounts" under the Accounts section and select the Action icon associated with the resource account you want to manage.
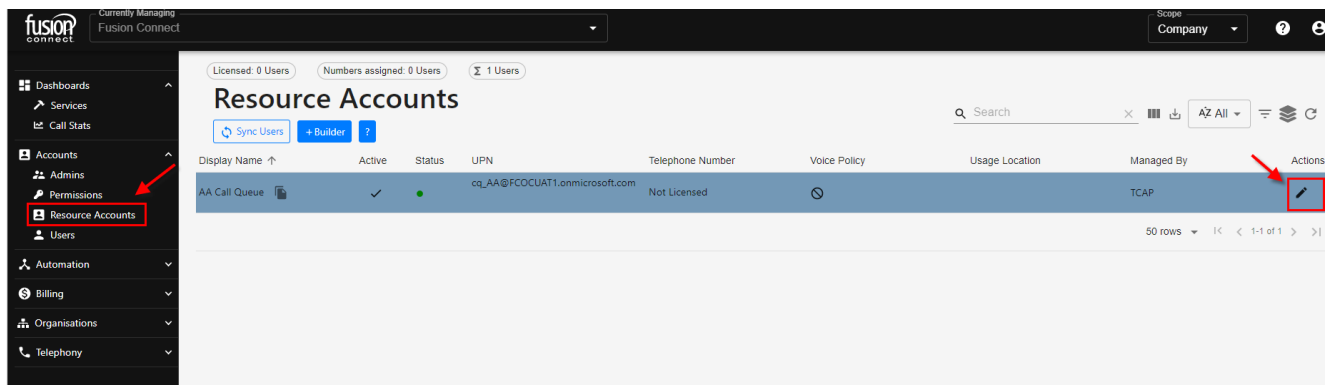
Creating Resource Accounts in Operator Connect

What is a resource account in MS Teams?

In Microsoft Teams, a resource account is **required for each auto attendant or call queue**. Resource accounts may also be assigned service telephone numbers. Fusion allows users to create, assign telephone numbers, and build a call flow for resource accounts directly in the Operator Connect Portal.
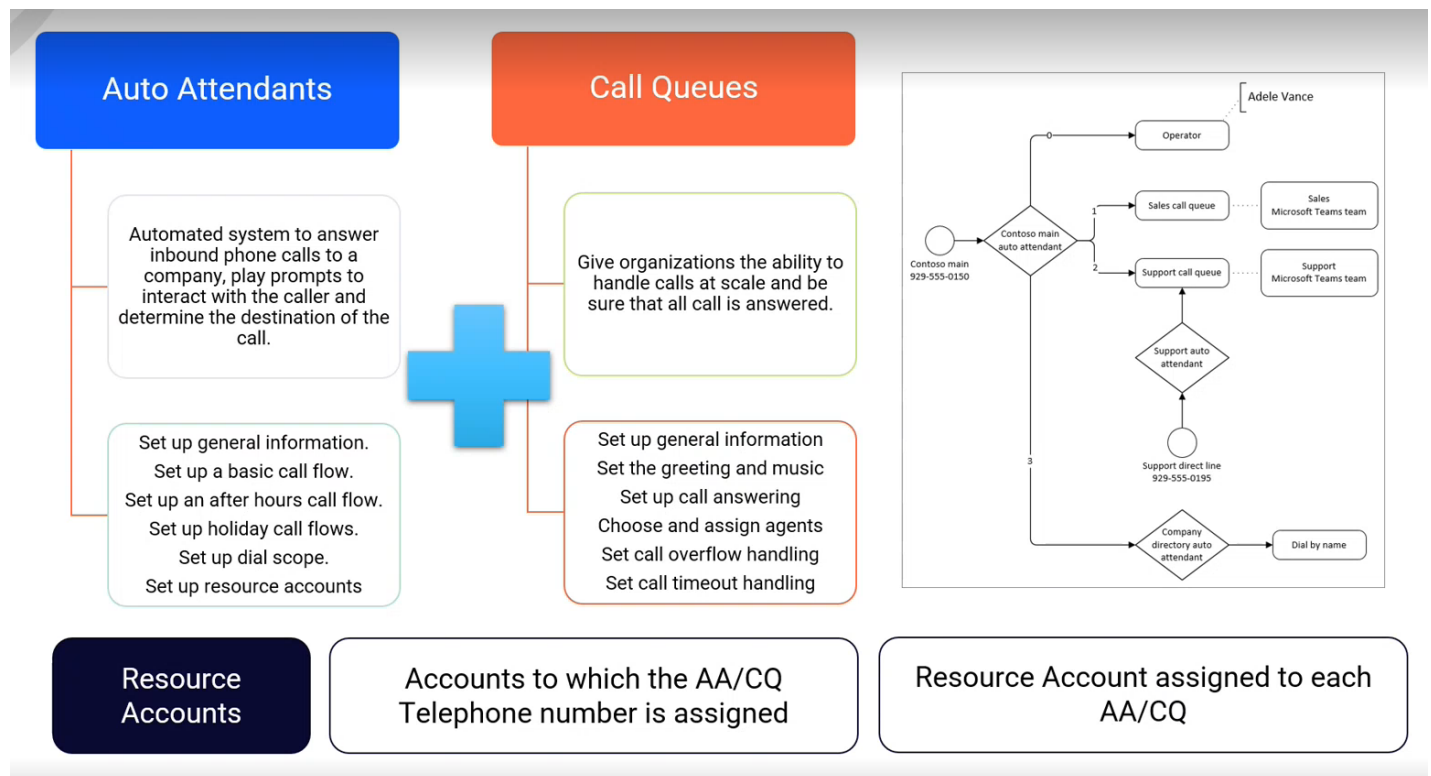
To create resource accounts, go to Resource "Accounts under the Accounts section and select +Builder. This will take you through the test to build the resource account.
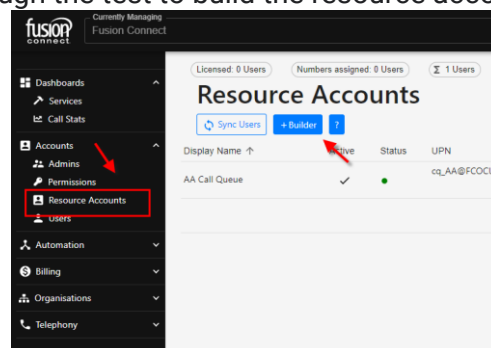
Once in the builder, populate the required fields to create the new resource account.

Call Flow Templates

When creating resource numbers within Operator Connect, the portal requires you to select a "Template" to apply a call flow. Templates will apply a generic call flow to the resource number that's being created. Please see the template details below:

Operator Connect Resource Templates:

Template Type	Template Name	Description
Auto Attendant	Basic	Basic auto attendant flow that allows inbound calls to be received, transfer to a message if it is after hours, or be transferred to a welcome message during business hours. Once the welcome message plays during business hours, calls will be transferred to a call queue. If the call is not picked up, it will time out and a message will play. "Sorry we could not get to your call in time. Please call back at another time." Once the message plays, the call will be disconnected
	1.5 Levels, 2 Options	This option provides everything in the Basic flow but allows calls to select prompts to be transferred according to options provided.
Call Queue	Queue Only - Attendant	The system plays a welcome message and then rings all users that are part of the queue. If the call is answered, it will time out and a message will play. "Sorry we could not get to your call-in time. Please call back at another time." Once the message plays, the call will be disconnected.
	Queue Only- Longest Idle	The system plays a welcome message and then ring the user that has been idled the longest that's part of the queue. If the call is not answered, it will time out and a message will play. "Sorry we could not get to your call-in time. Please call back at another time." Once the message plays, the call will be disconnected.

Managing Auto Attendants and Call Queues in the MS Teams Admin Portal

Below are instructions on how manage Auto Attendants and Call Queues in the MS Teams Admin portal.

Making available Phone Virtual Licenses
Any organization with Phone System has 25 Virtual User licenses no cost.
To unlock Microsoft Phone System Virtual User licenses:

1. Sign into the Microsoft 365 admin center.
2. Go to **Billing > Purchase services > Add-ons**
3. Scroll to the end to find the Microsoft 365 Phone System – **Virtual User license**. Select **Buy now**. Please contact your CSP if unable to add these licenses.

Add Resource Accounts an Assign Licenses

To create Teams Resource accounts

1. In the Teams admin center, expand **Org-wide settings**, and then click **Resource accounts**.
2. Click **Add**.
3. In the **Add resource account** pane, fill out **Display name**, **Username**, and the **Resource account type**. The resource account type can be either **Auto attendant** or **Call queue**, depending how you intend to use this resource account.
4. Click **Save**.

To assign a license to the Resource account.

1. In the Microsoft 365 admin center, click the resource account to which you want to assign a license.
2. On the **Licenses and Apps** tab, under **Licenses**, select **Microsoft 365 Phone System - Virtual User**.
3. Click **Save changes**.

Additional Teams Call Flow Help Links

What are Cloud auto attendants? - Microsoft Teams | Microsoft Docs
Set up an auto attendant for Microsoft Teams - Microsoft Teams | Microsoft Docs
Create a call queue in Microsoft Teams - Microsoft Teams | Microsoft Docs

Managing Triggers in Operator Connect

Another feature within the Operator Connect portal is the ability to create triggers, and a trigger is an event driven notification. Notification can be sent by e-mail, it can be sent via Web hook to a third party via APIs, but the core message is we're enabling change management functionality within the service,

so any changes that are pertinent to the service, whether that's change, whether it's a synchronization failure, whatever it may be.

Creating Triggers

To create a Trigger, go to Triggers under the Automation section and select +Triggers.
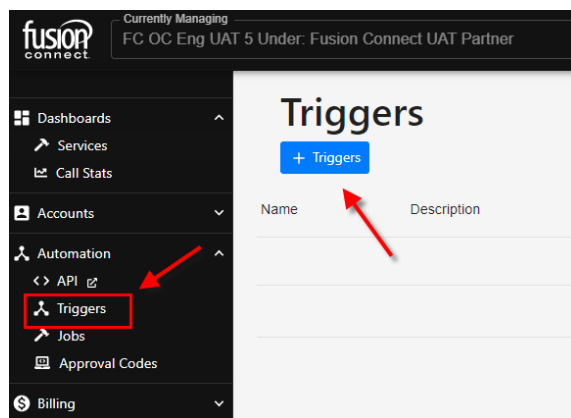
When creating a Trigger, you will need to fill out the following items:

Name: Name would like to use to identify the Trigger being created, i.e. "User change notification".

Type: This will default to "Company" as you can only setup Triggers for your company.

Company: This will default to your company name.

Event: This is the item you are looking to occur to initiate the Trigger notification. This can be a change in the portal, pairing issues, etc.

Action: This will be how you are notified with the event occurs. Your options are as following.

   Email: The location Triggers will be sent to by email.

   Webhook: Allows Triggers to be sent via a webhook to a URL using the Get, Post, or

   Put methods.

Triggers via Email

If you are creating a Trigger using the Action type email, you will need to provide the following:

1. Email addresses you want the notifications to be sent to.
2. Subject Line
3. And email body.

To pull in information associated with the items in Operator Connect, you may add existing fields to the subject or body. Do this may placing your cursor in the part of the subject or body that you want the field be presented and select the item you want displayed from the fields box.

Once the Trigger event occurs, an email be sent to email addresses associated with the trigger.

Triggers are also available via A Webhook if needed.

Support Contacts

If you have questions or experience issues while using the Operator Connect Portal, please contact our support departments listed below.

- Billing Inquiries/Adds and Changes/Customer Support: (https://customerrequest.fusionconnect.com/) 1 – 888-301-1721 – Option 1

- Technical Support – https://www.fusionconnect.com/support – 888-301-1721- Option 2)