BenePortal – Quick Start Guide

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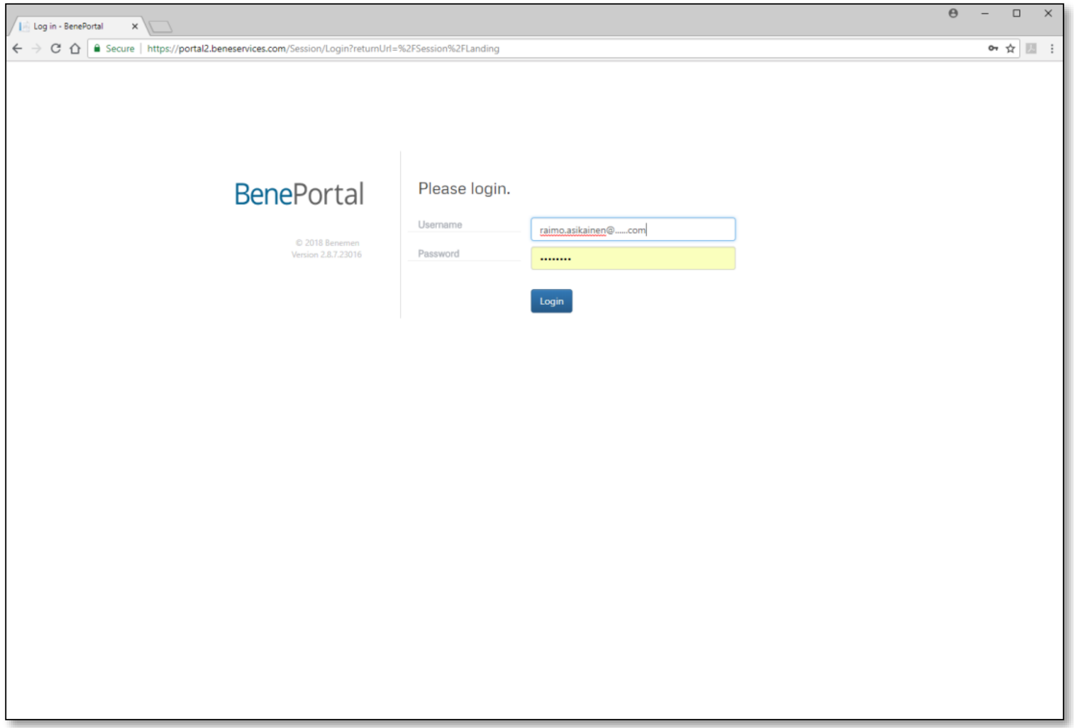

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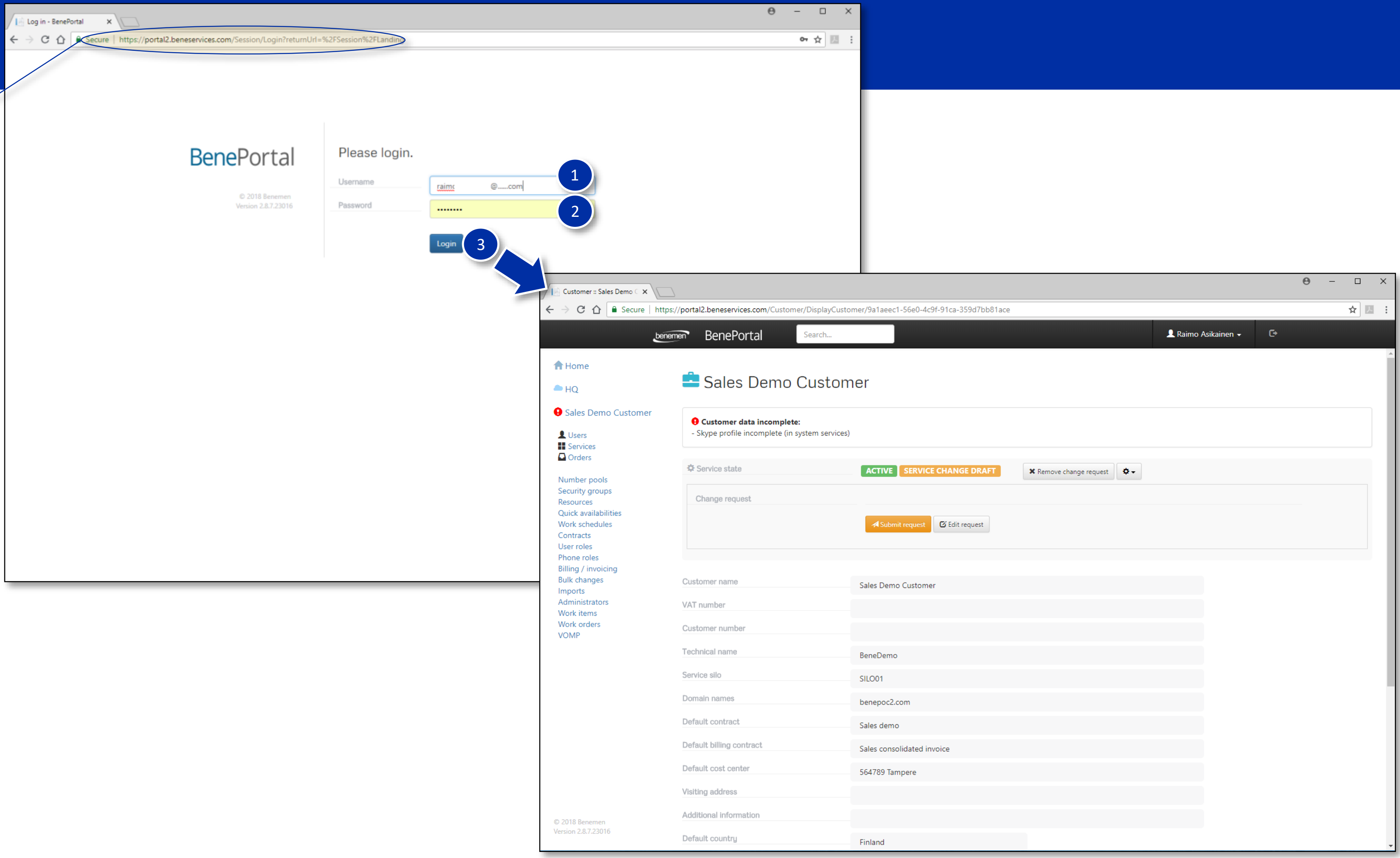
Login

Log in address to the BenePortal:
https://portal2.beneservices.com



The following fields needs to be filled:

1. Username
2. Password
3. Click the **Login** button
   (or **Enter** on the keyboard)

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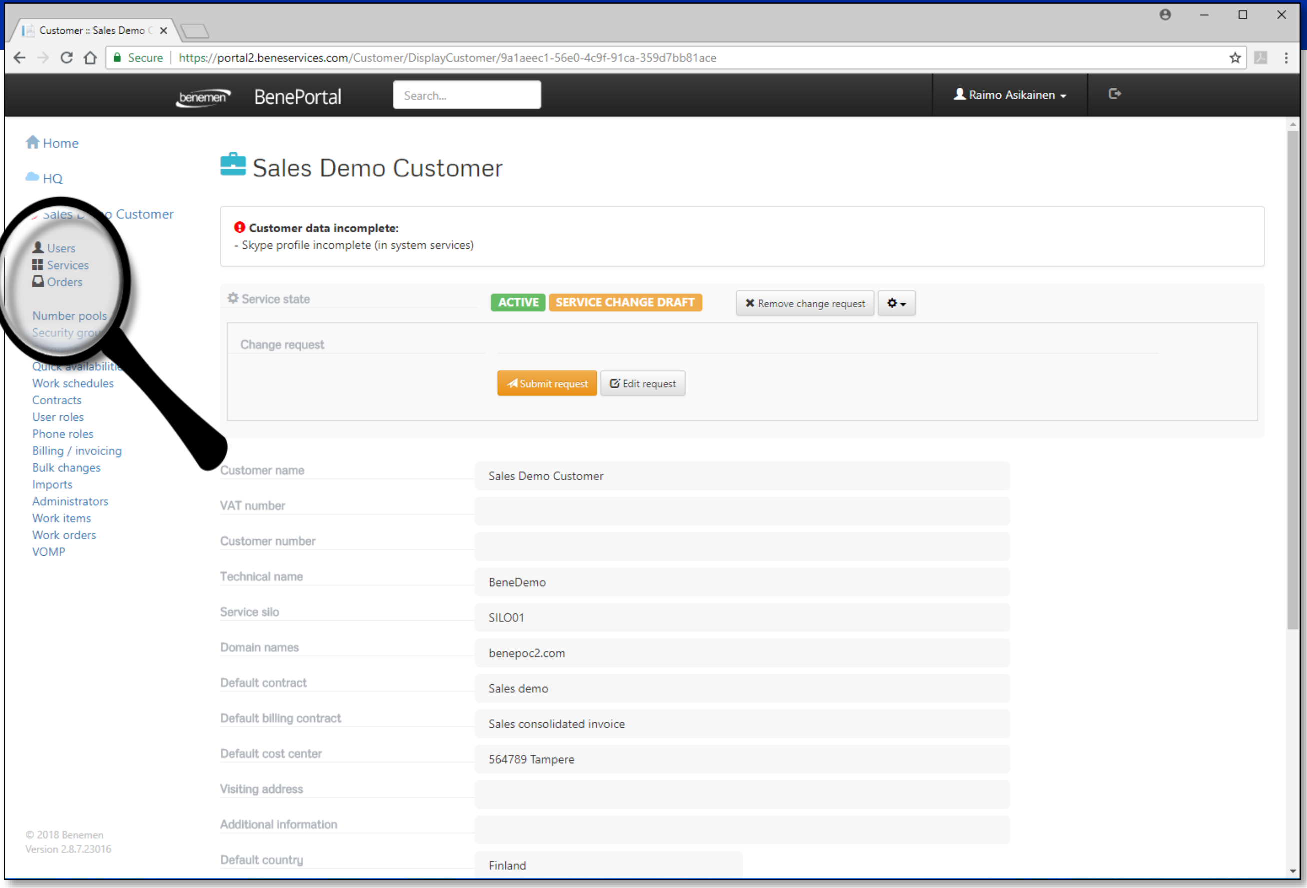
Main page

On the main page can be found the system's most important features

- Users
- Services
- Orders



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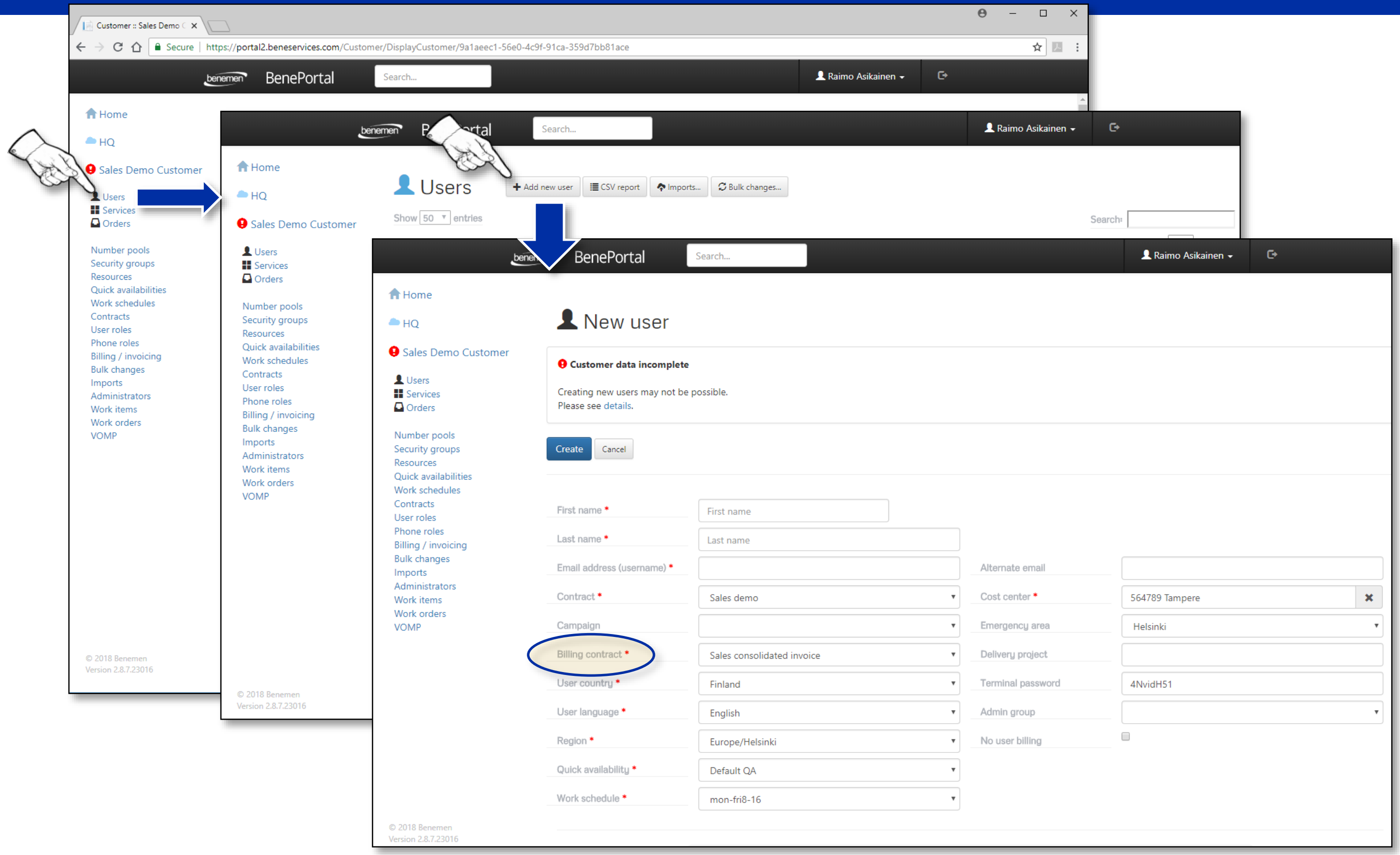
User activation, basic information 1

A new user activation process is based on a few steps:

- Click **Users** on the left-hand side pane on the main page
- Click the **Add new user** button on the **Users** page
- Fill in the needed information
  - Fields marked with the asterisk are mandatory
- **User country** defines only the country and it's important for defining the Emergency area
- **Region** defines the **Time Zone**, where the user is located
  - Region is used to keep all scheduled availability statuses in the correct time zone
- Fill also the **Directory information** below the personal information (see the next page)...



Notice!
The "Billing Contract" defines the invoice that the user will appear in.

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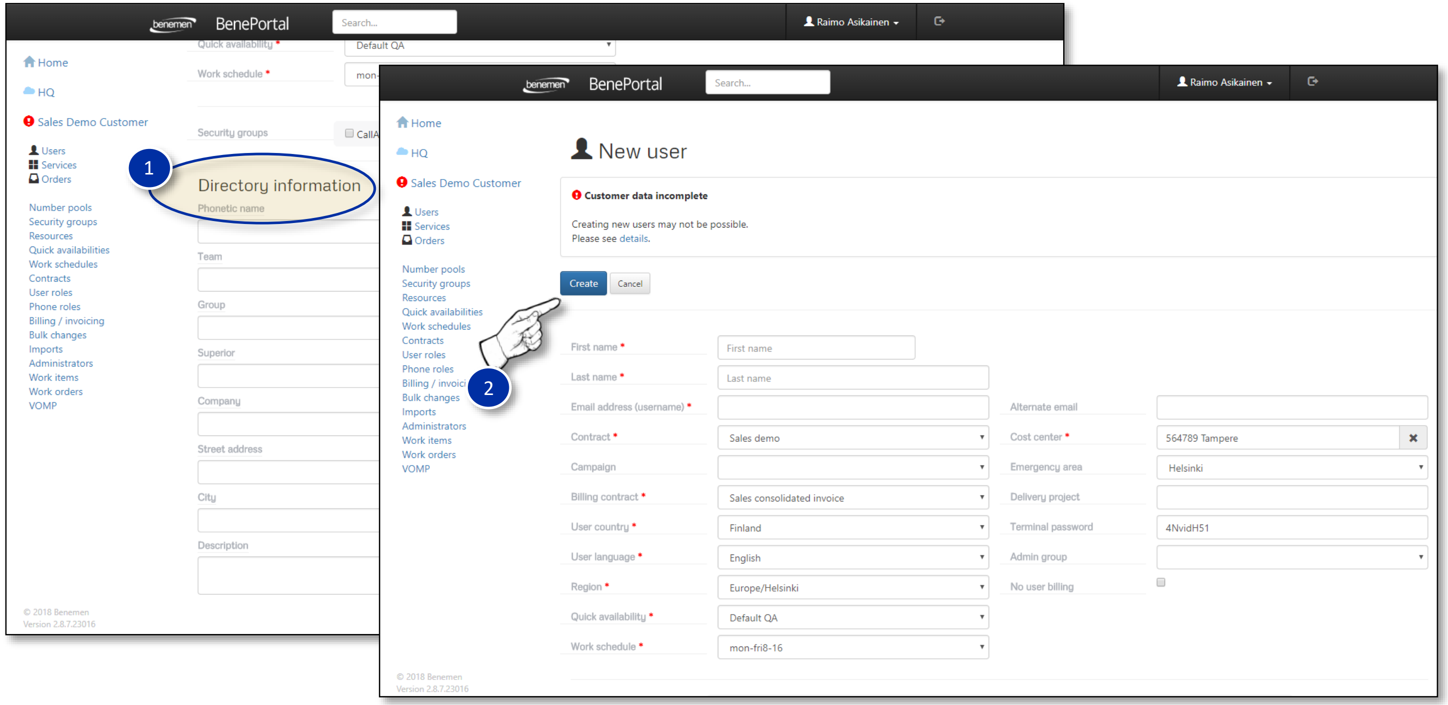
User activation, basic information 2

1. Fill also the **Directory information** below the personal information
2. Click the **Create** button

Directory information will go to the *ww.benedesk.com* Directory and Portal Resources.



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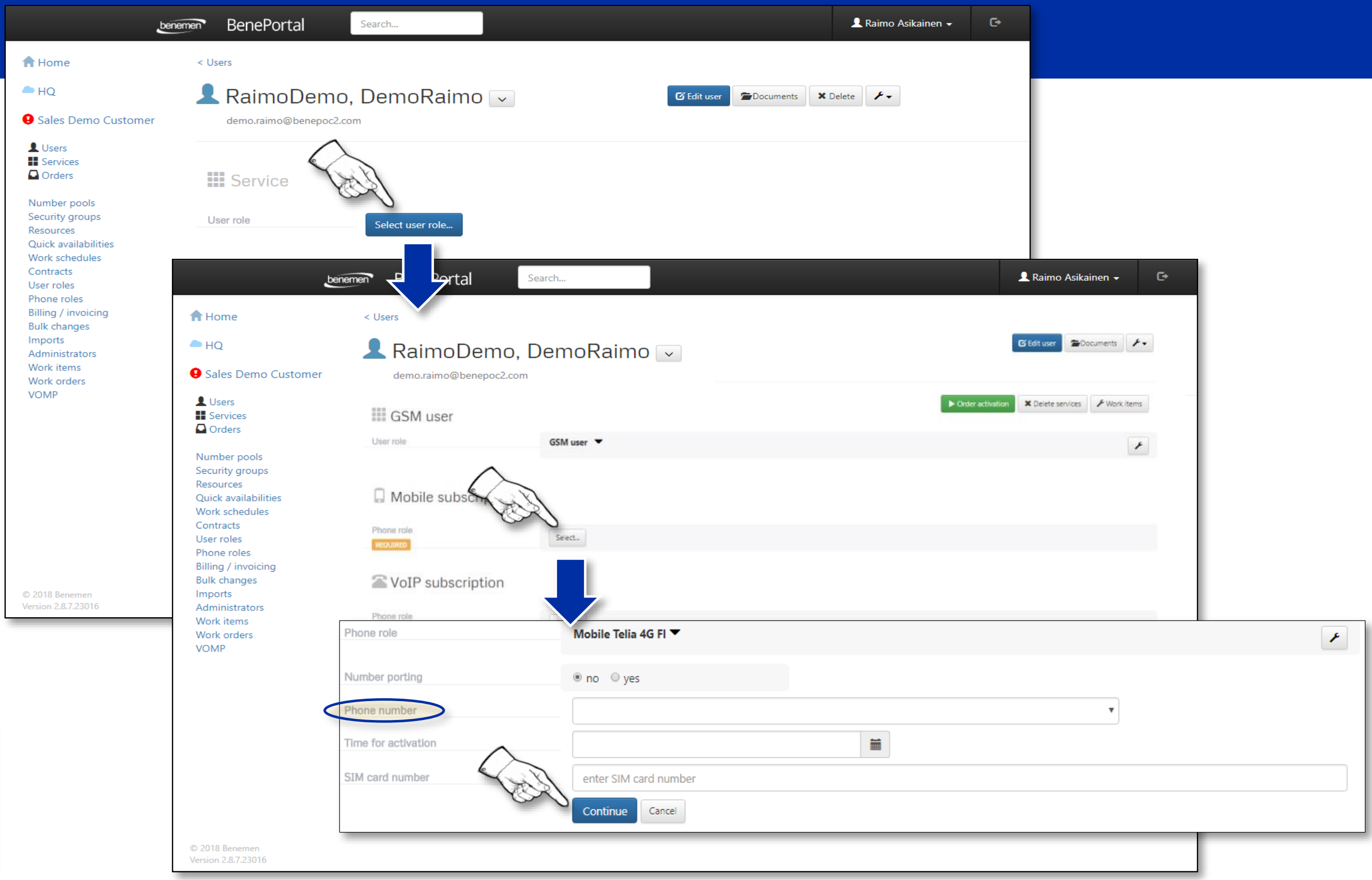
User activation, user role

Making the user role settings

- The user role settings are done by clicking the **Select user role*** button
- The numbers and services, which needs to be activated, are marked as "Required"
  - There is also a possibility to add optional numbers for the user (the options DataSIM and ExtraSIM are only for Finnish users)
- User activation is continued by clicking the **Select** button on the **Phone role** selection
- The phone number will be selected from the **Phone number** dropdown menu
- The SIM card number will be filled into the **SIM card number** field
  - If the SIM cards area available, they can be used, and the support will activate the number
  - If the SIM card field is empty, support will send the SIM card to the contact address
- In a case, when the number needs to be activated later, the time is selected from the **Time for activation** selection



***Notice!** **After choosing the User role, the e-mail address cannot be changed in the Portal, so check that the email address is correct.**
In a case the email address needs to be changed, please send a ticket to the support for the needed changes.

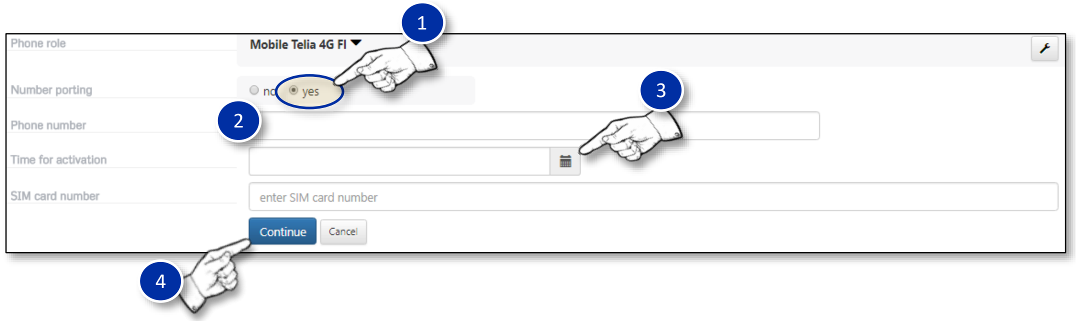
Mobile = Mobile number
VoIP = Fixed line number or work number without mobile usage and data access
External = Not a Benemen number

benemen

User activation, numbers 1

Porting the number

1. Choose the **Yes** radio button on the **Number porting** selection
2. Fill in the number to be ported (fill also the correct country prefix, e.g. *+358*401234567)
3. Click the **Calendar** icon on the **Time for activation** and choose the activating time
4. After filling the needed information, click the **Continue** button



- If the number should be ported as soon as possible, click the current date on the calendar
- If the number should be ported later than 5 business days, choose the correct time for the porting

User activation, numbers 2

Phone role settings

A The **Phone role** settings (the wrench symbol) includes the following settings:
- Change role
- Manage products
- Remove number

Change role

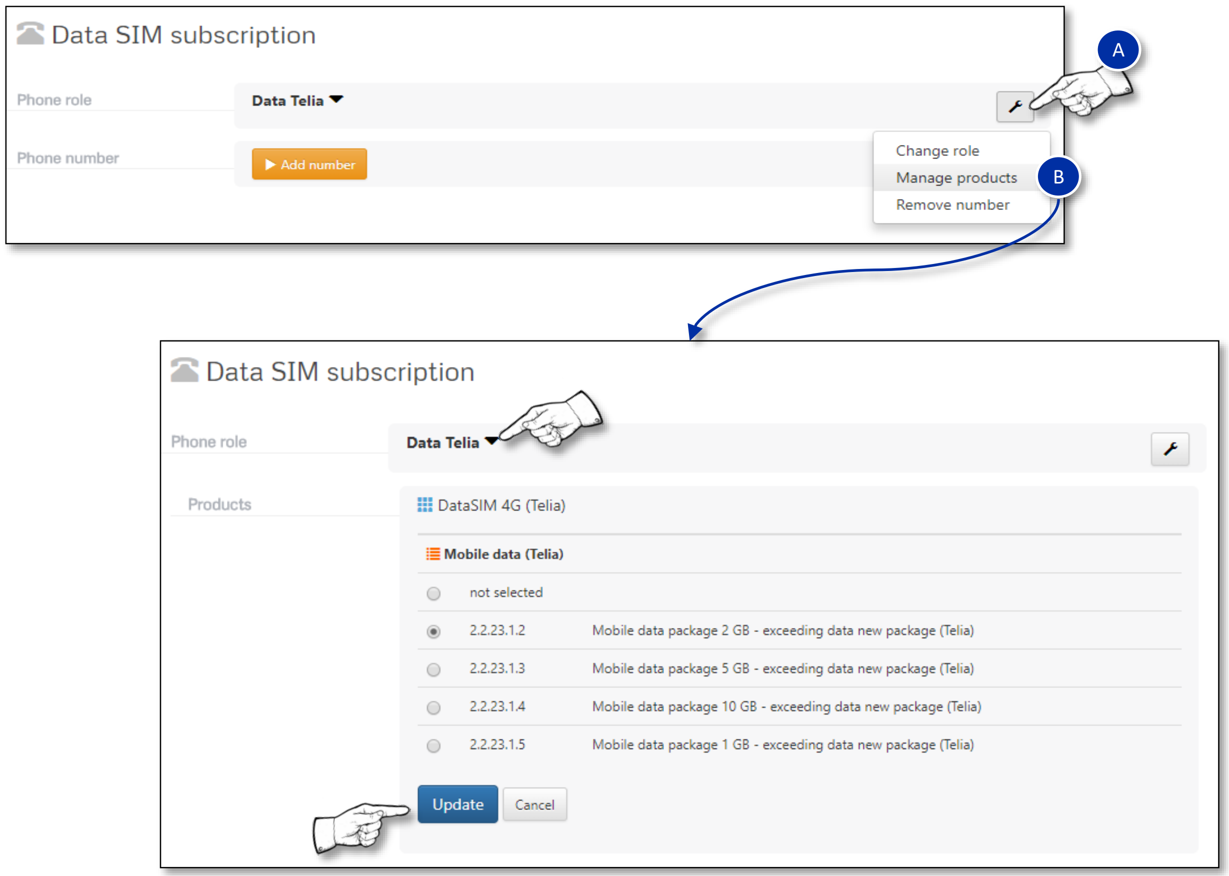
- A new page opens, where it is possible to change the user role by selecting from the available selections

B Manage products

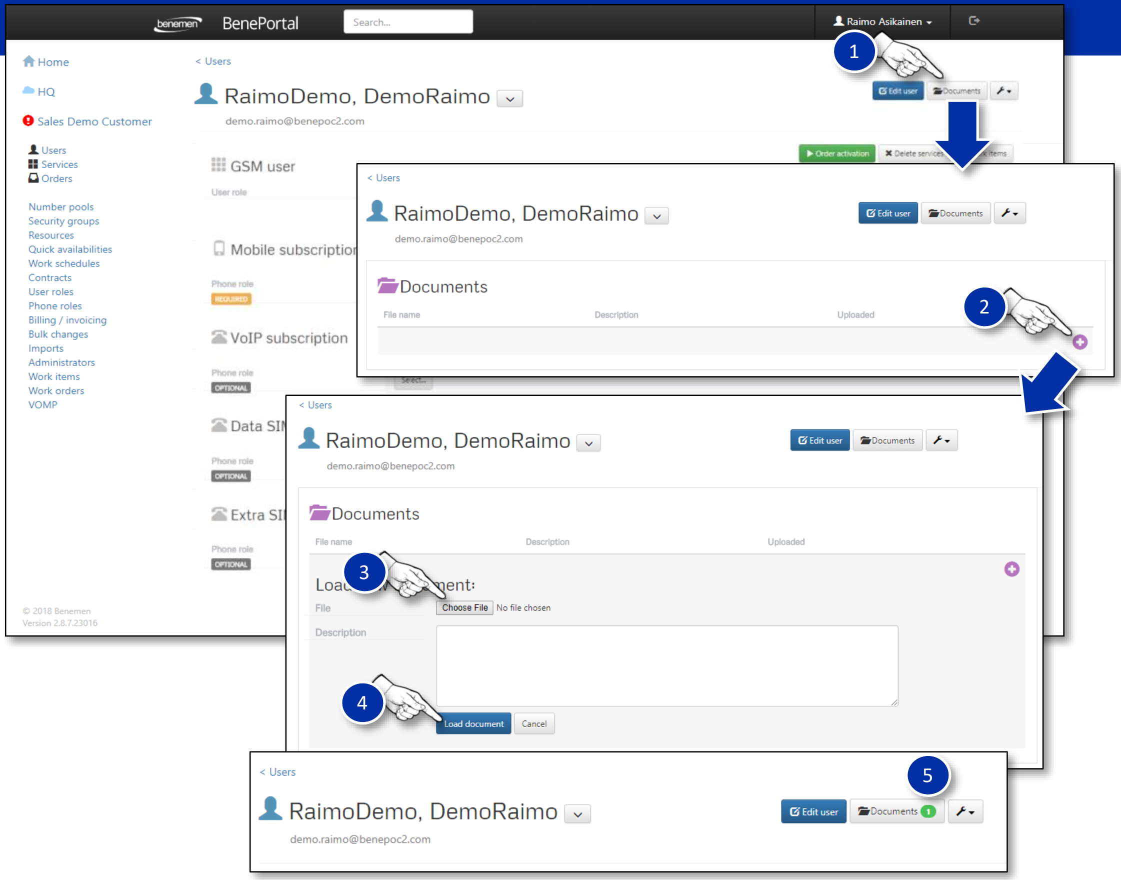
- Data package size selection (see the picture)
- Other product related changes
- The changes are saved by clicking the **Update** button

Remove number

- Removes the current number



User activation, documents



Adding documents

To the user account can be attached documents by following the next procedure:

1. Click the **Documents** button
2. Click the pink/purple **Plus** symbol
3. Search the file by clicking the **Choose file** button
4. After selecting the attached file, load the file with the **Load document** button
5. The number of downloaded files can be seen on green background on the **Documents** button.

User activation, order activation

Order activation

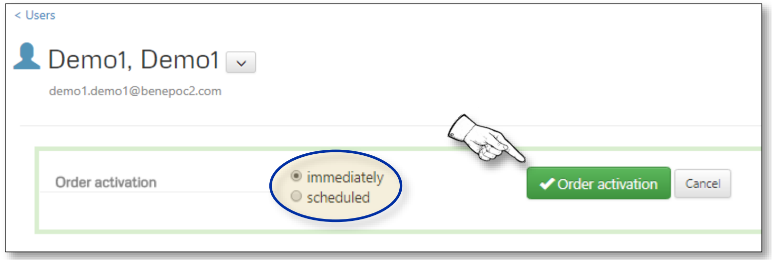
The order activation can be done:
- Immediately
- Scheduled

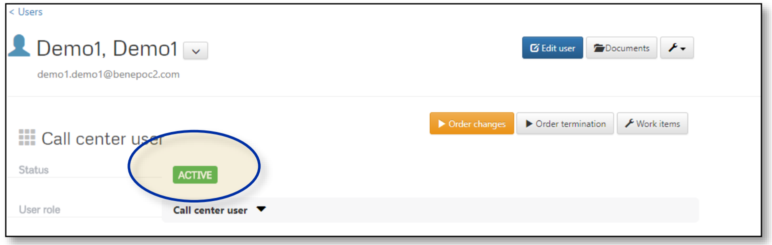
The **order is activated**, when all the necessary settings are done, by clicking the green **Order activation** button. By clicking the Order activation button, the user will go to Pending activation state.

All services will be activated immediately if not scheduled differently, except the following products:
- Email service channel
- Chat service channel
- *BeneReports* Manager

If the user has a Finnish number, the order will be sent to support for confirmation and activation. The support will fill the correct porting time into the number details.

Once the user page has the green **Active** sign on, all services and numbers for the user are set completely for the use. Before that, changes are not possible, and the pending services won't be active.





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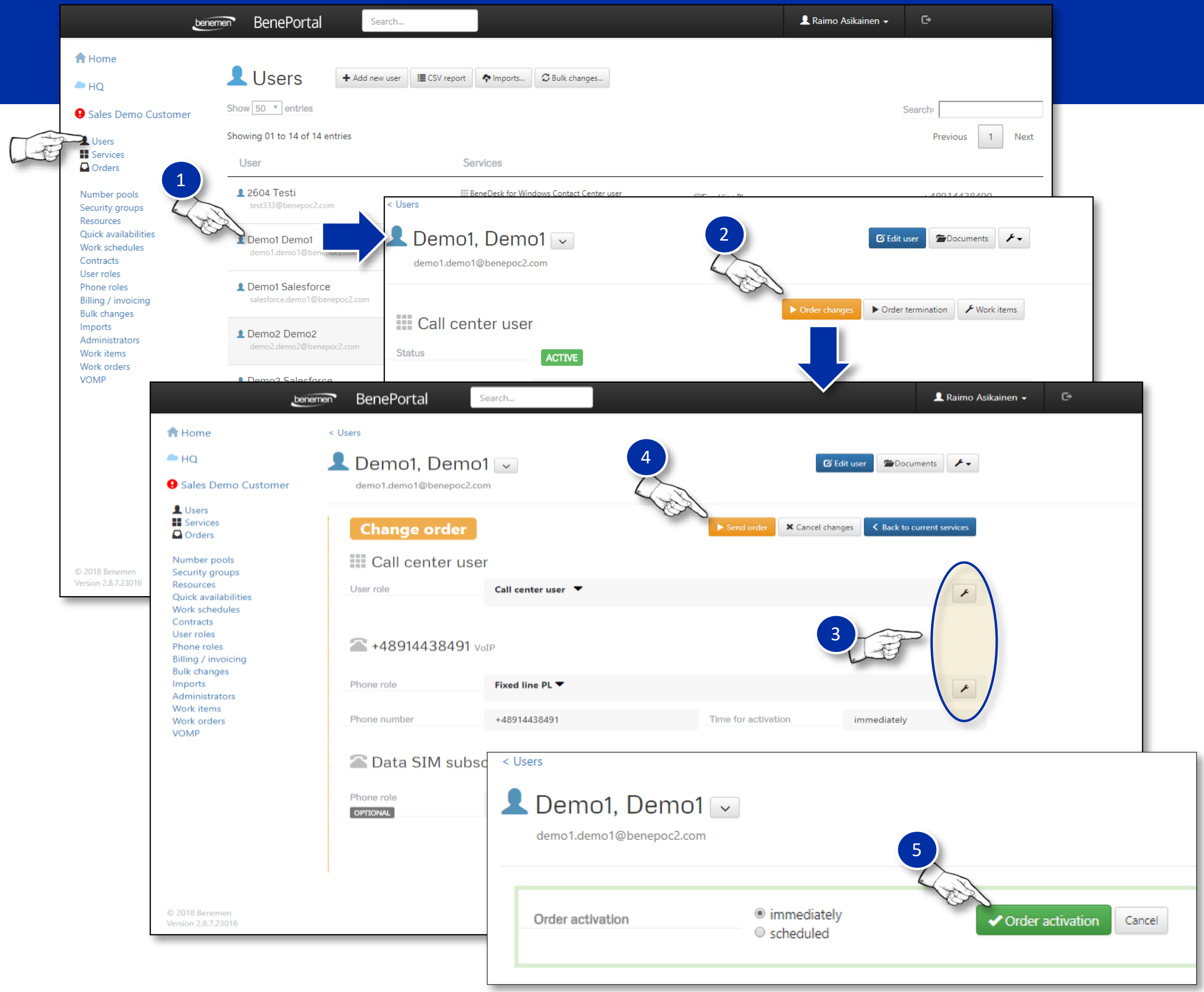
User modification, service and number changes

Service and number changes

1. The user must be opened from the **Users list**, to modify user services, numbers or information
2. To make changes, click the **Order changes** button
3. Click the **wrench icon** either on the **User role** or the **Phone role** depending on which one you wish to modify
4. After the changes are done, click the **Send order** button
5. On the next page click the **Order activation** button
(the changes can be made immediately or scheduled)



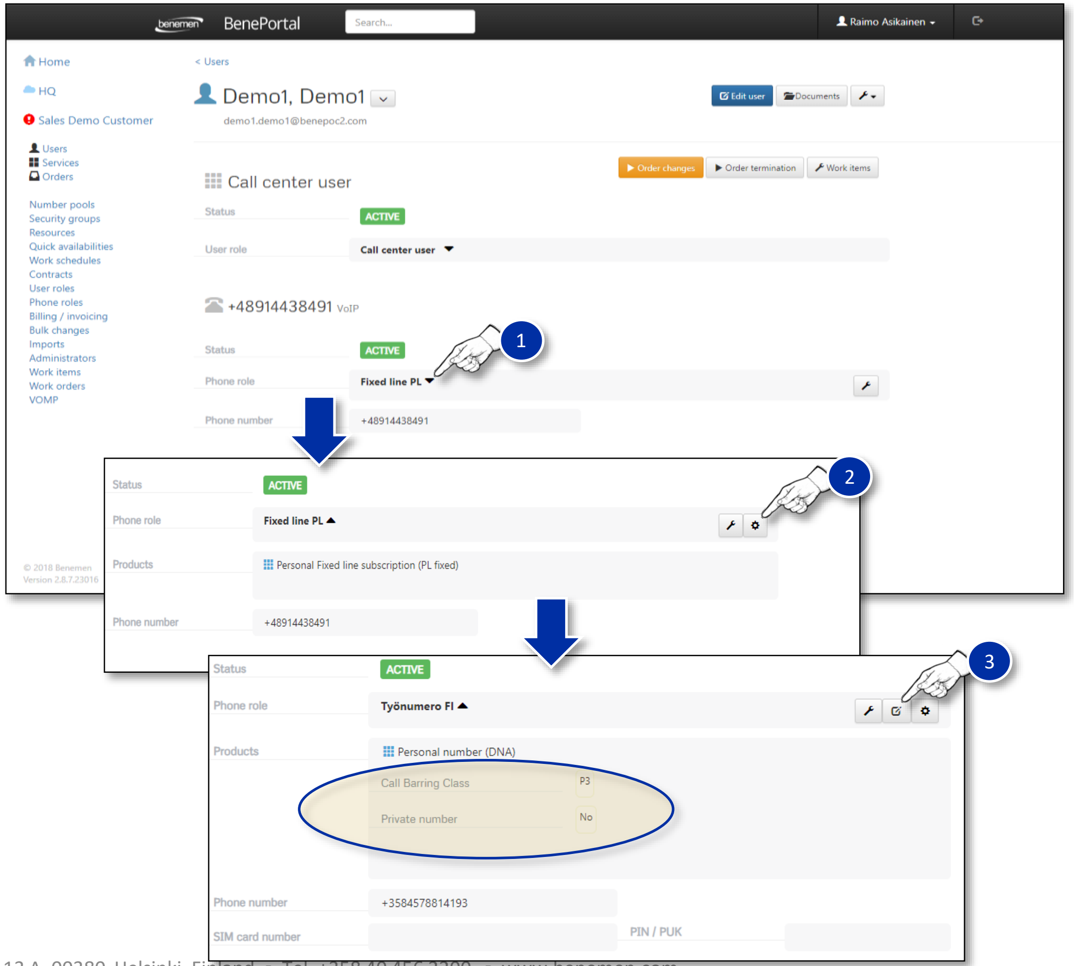
User modification, number setting changes

Changing the number settings

To change Barring classes or roaming limits, after clicking the Order Changes button:

1. Click the **expand/collapse icon** next to the Phone Role name to open the Operator products list
2. Click the **Settings** button, which will show all the settings for the number
3. To edit the information, click the **Edit** icon

After the changes have been saved, click the **Send Order** and **Order Activation** (immediately or scheduled) buttons.

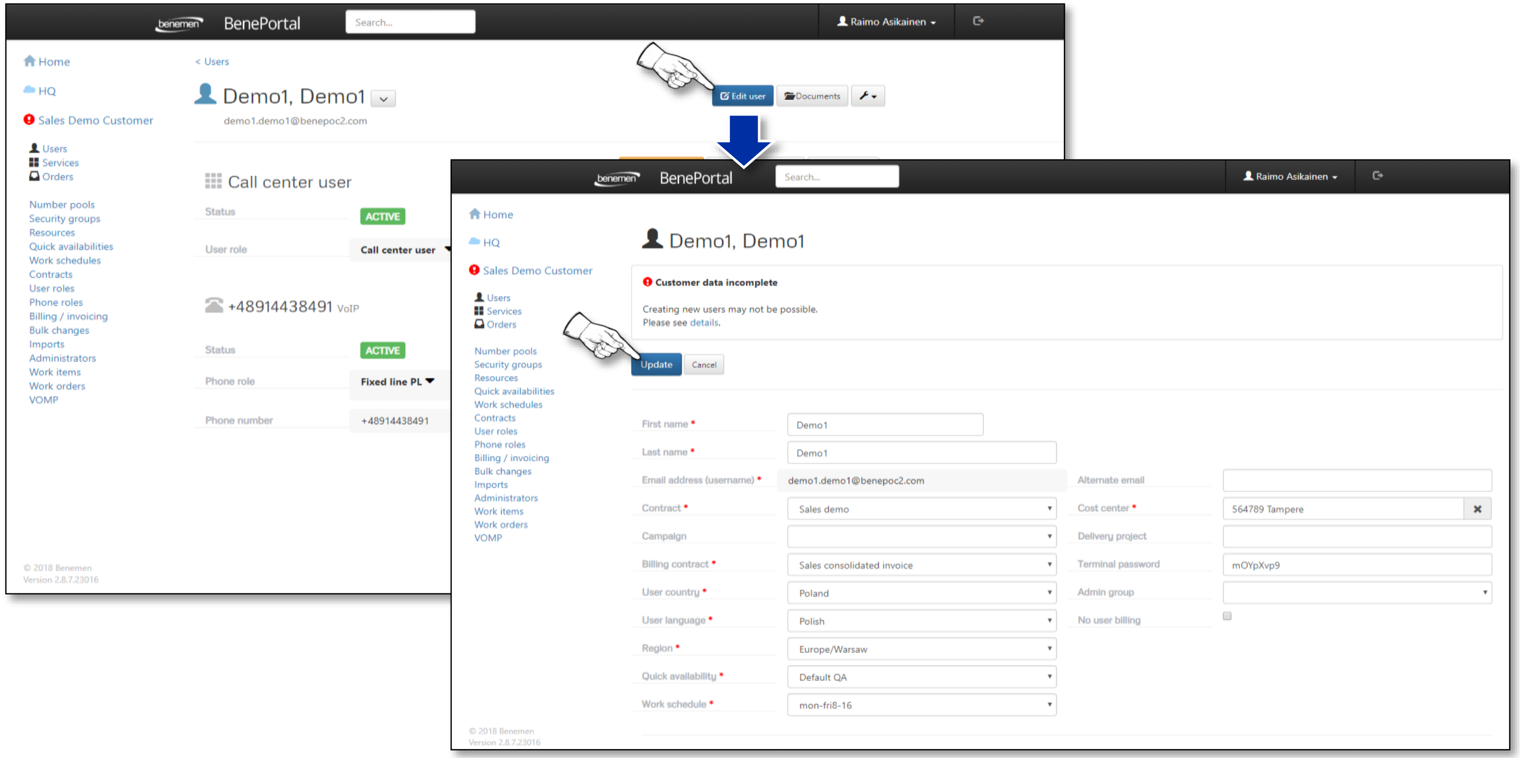


User modification, user information changes

User information changes

- To change other user information (Cost Center, Billing contract, name etc.), click the **Edit user** button
- After the changes are done, click the **Update** button
    - All changes will be immediate
- E-mail address is the only information that cannot be changed via portal

In a case the e-mail address needs to be changed, send a ticket to the support for the all necessary changes.



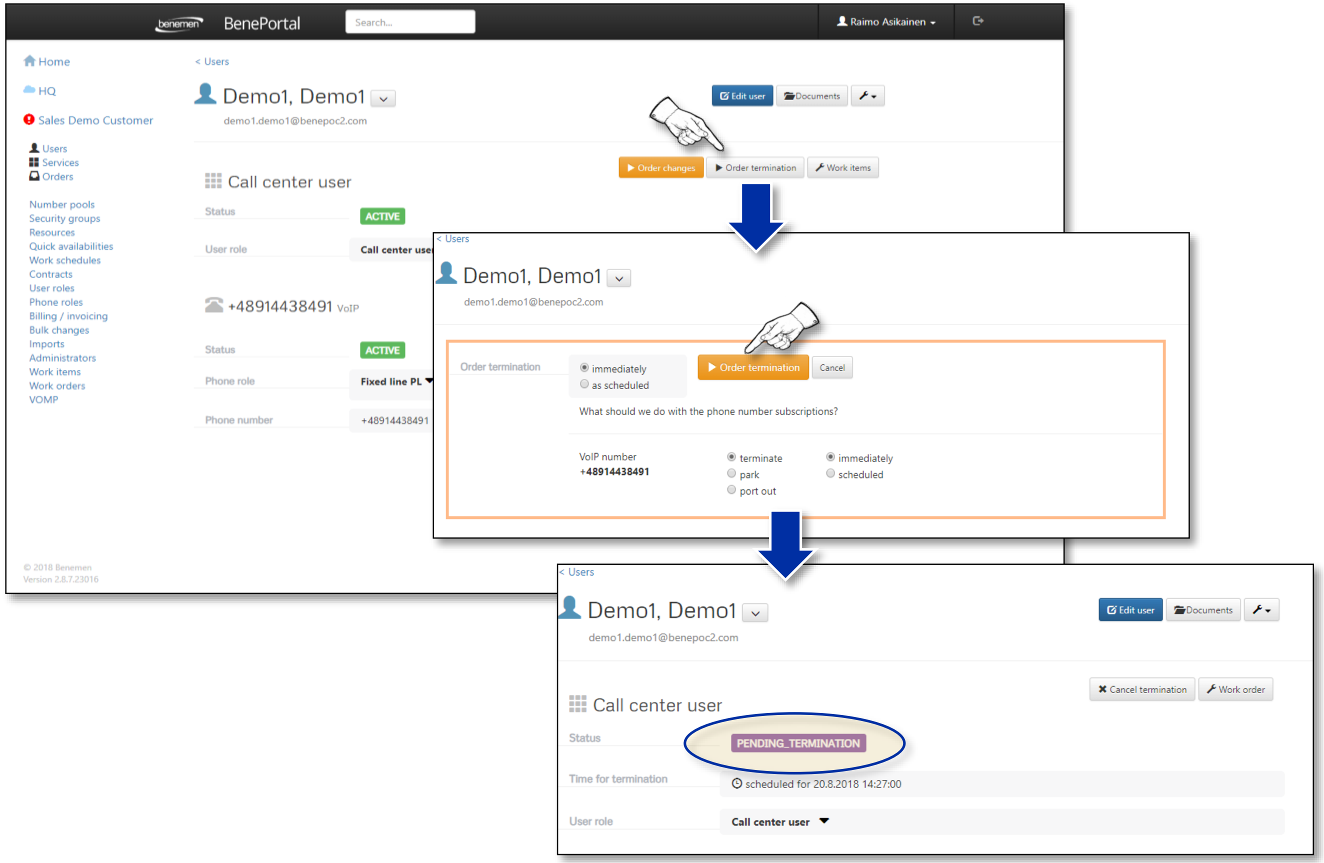
User termination

User termination

A user termination can be made immediately or scheduled, and the user's number can be terminated, parked or ported out.

- To terminate a user, click the **Order termination** button
  - The termination needs to be confirmed in the next view
- After clicking the **Order termination** button, the user will be in a *Pending termination* state
  - Cancelling the termination is still possible as long as the order has not gone further
  - The termination will stay in this state until the number has been manually handled by the support (only Finnish numbers)
  - In a case there are no products that need manual handling by the support (number, e-mail channel etc.), the cancellation will go through automatically

The user information after the termination is done, is shown on the next page.



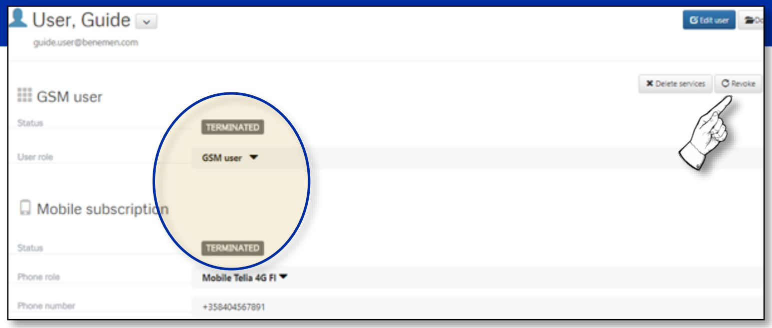
User termination, completing the termination

Completing the user termination

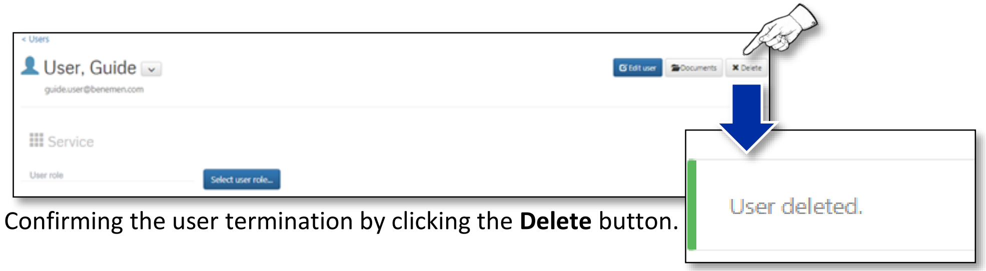
When the user is terminated, the user status is shown with a grey **Terminated** sign, which means:

- All services and numbers are not in use and are not in billing
- All services can be revoked (by clicking the **Revoke** button) to the previous state, or all information can be completely deleted
  - After all services are deleted, the user's basic information will still be in the Portal and BeneDesk Directory (in Terminated state) until the user is completely removed from the Portal
- When the user is removed completely (in Deleted state) from the Portal, all user's information will be removed also from the BeneDesk Directory

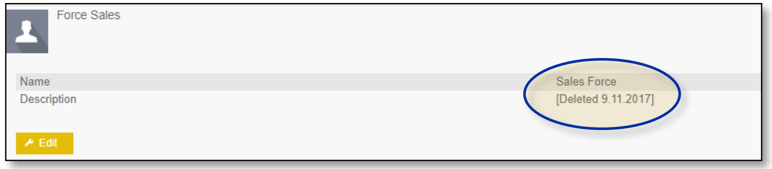
Click the **Delete** button (confirmation) and the window will switch to the User list and a *User deleted* message will be shown on the top of the page



The user information after the termination is done.

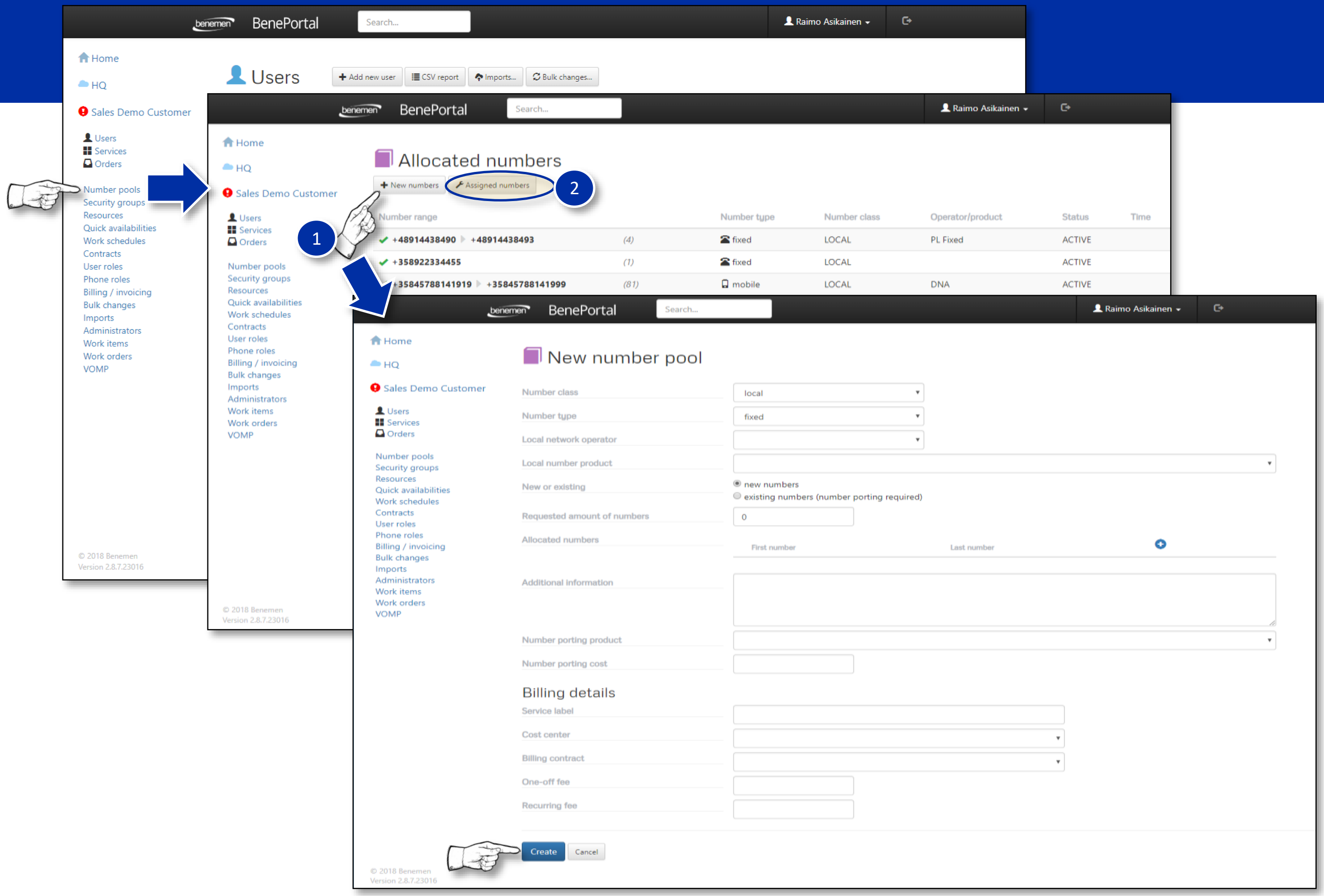


Confirming the user termination by clicking the **Delete** button.



Deleted user information.

Number pools



Number pools

A number pool is a list of the numbers, which are allocated for a user. The number pool page can be opened by clicking the **Number pools** link on the left side pane.

The numbers can be:

- Call channel numbers
- Fixed line numbers
- Mobile numbers

1. The numbers and call channels, which are allocated to a user, must be listed on the **Allocated numbers** page.
2. New numbers are requested by clicking the **New numbers** button, filling the form and clicking the **Create** button.

See the next page for more detailed information of requesting new numbers.

2 The **Allocated numbers** will show a list of all numbers in use and the users to whom they are assigned to.

Number pools, requesting new numbers

Requesting new numbers

- Choose the **Number class**
- Choose the **Number type**
- Select **New or existing** number with the *new numbers* or *existing numbers* radio buttons
- The amount of needed numbers is filled in the **Requested amount of numbers** field

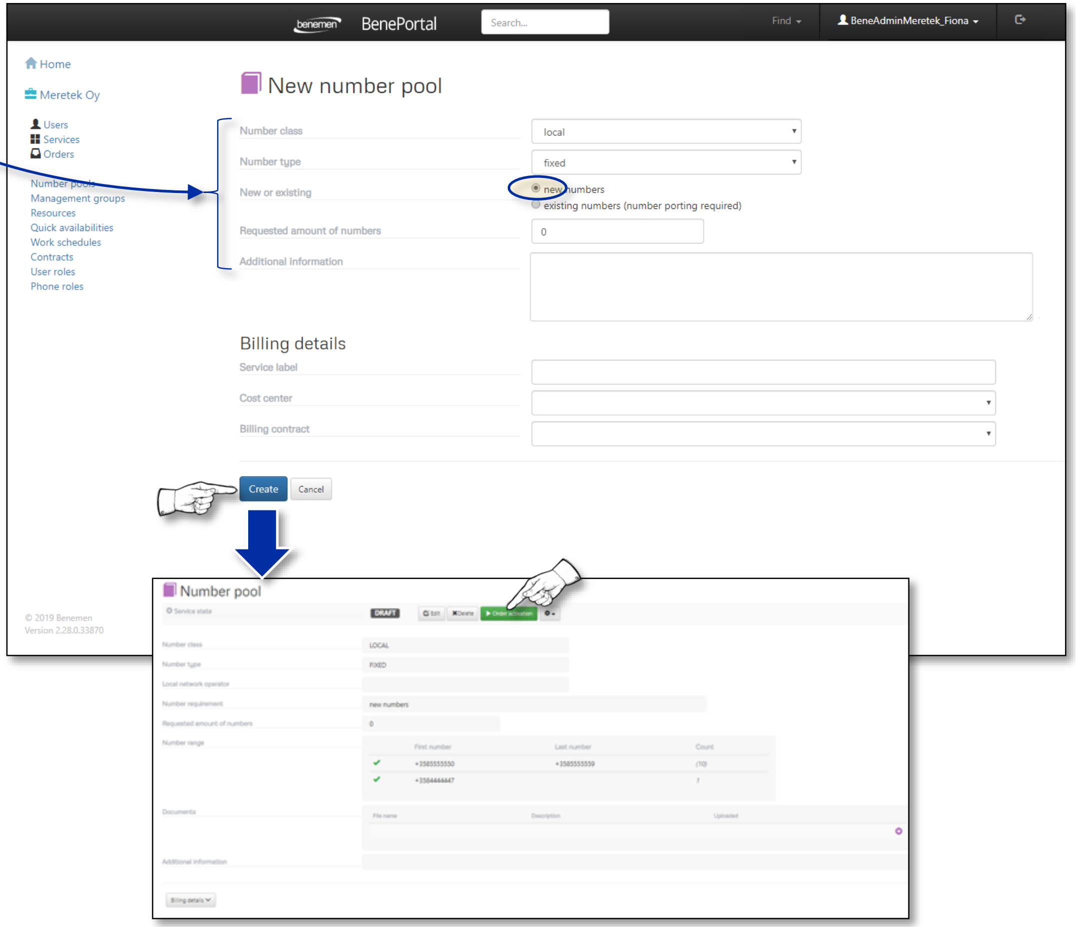
New numbers

The new numbers are assigned by the support and the amount of numbers needed (generally the minimum or 10 numbers) are assigned at once.

Finalizing the number request

- Add a cost center and a billing contract
- Click the **Create** button
- Activate the order on the next view, by clicking the **Order activation** button

Support will add the numbers or start porting and activates the number pool.



Number pools, existing numbers

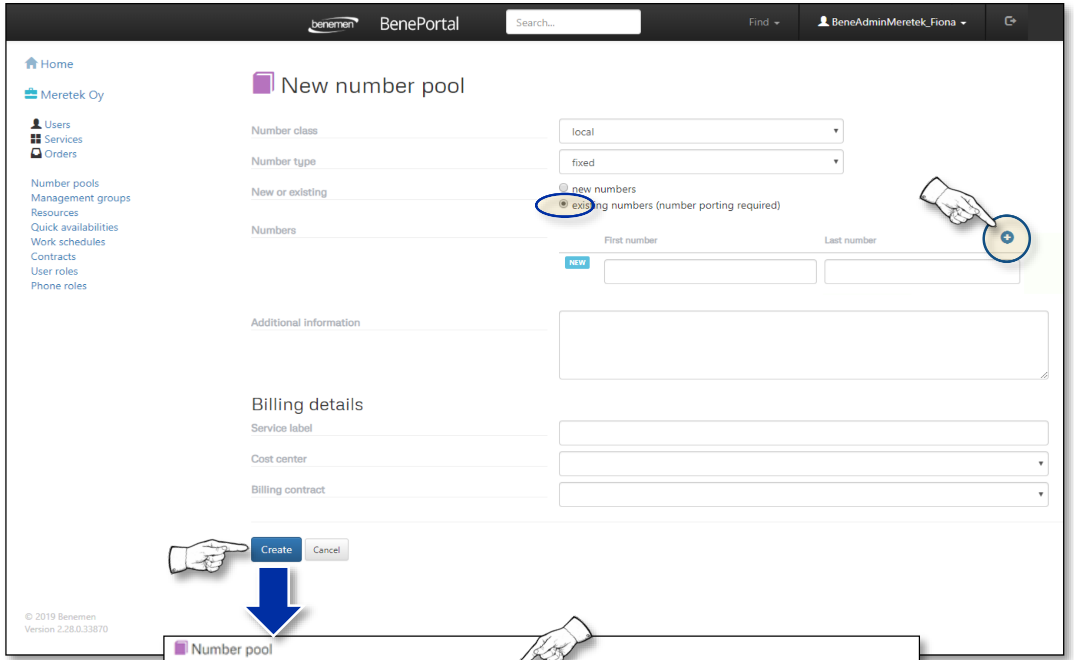
Existing numbers (number porting required)

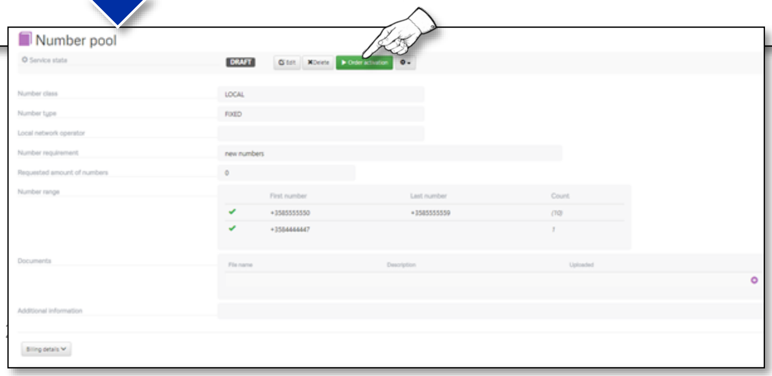
Click the **blue plus** symbol on the **Allocated numbers** row and the first number and the last number to be ported. If multiple separate numbers need to be added, add a new line by clicking the plus symbol.

Finalizing the number request

- Add a cost center and a billing contract
- Click the **Create** button
- Activate the order on the next view, by clicking the **Order activation** button

Support will add the numbers or start porting and activates the number pool.



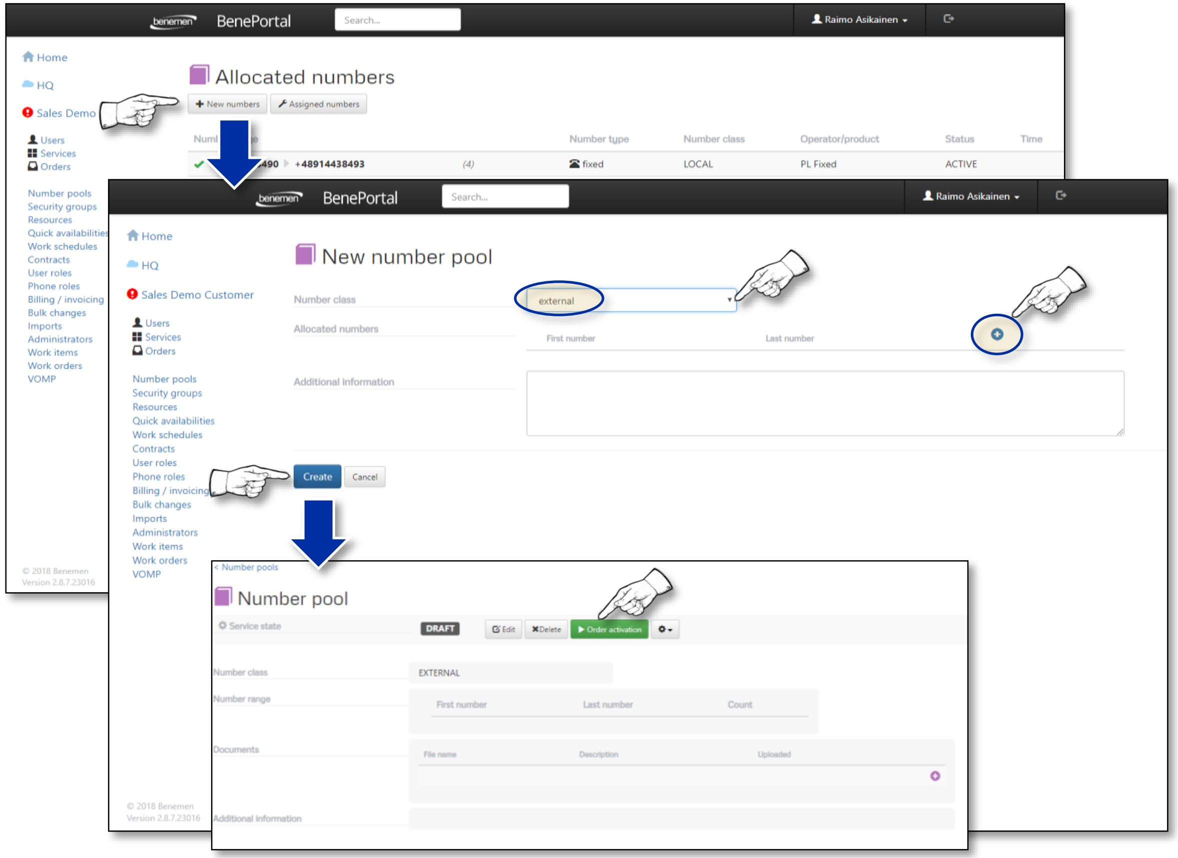


Number pools, external numbers

External numbers

To add external numbers:

- Click the **New numbers** button
- Choose **external** from the Number class dropdown menu
- Add numbers from the **plus symbol**
- Click the **Create** button
- Click the **Order activation** button on the next view



Management groups, Edit user page

Management groups

Management groups are needed for the call channel control. A user who has a Call Channel membership and must be able to take service queue calls, needs to be added into a management group. There are two places to do this:

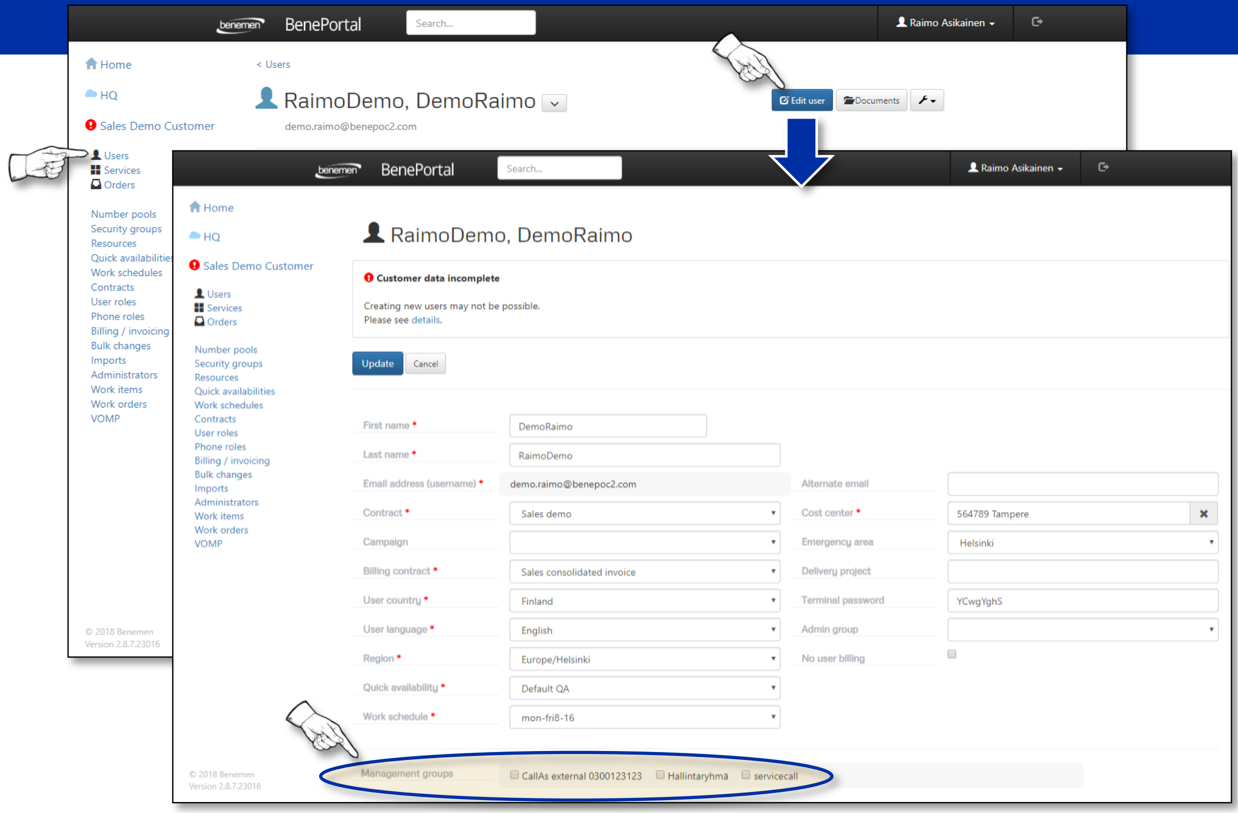
- Edit user (on the Edit user page)
- Directly in the Management group (see next page)

Editing user on the Edit user page

- Click the **Edit user** button
- Make the changes to the **Management groups** information

If there is a need for changes in a management group, click the **Request changes** button and write the needed change to create a ticket to the support.

A user cannot see the service channel status in *BeneDesk*, if a Management group is not selected. Users who are in the management group and have group manager user rights can control the service queues and the users in the management group.



Management groups, Management goup-page

Management groups

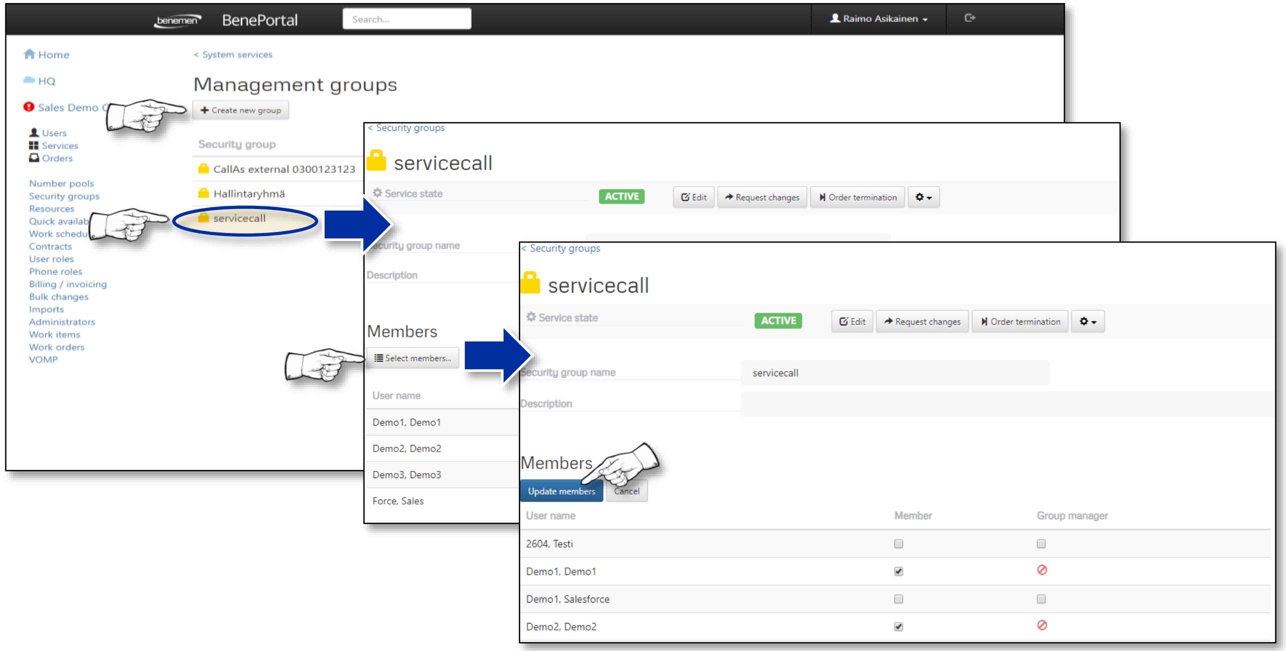
Management groups are needed for the call channel control. A user who has a Call Channel membership and must be able to take service queue calls, needs to be added into a management group. There are two places to do this:

- Edit user (on the Edit user page) (see previous page)
- Directly in the Management group

Editing a user directly in the Management group

- Select the group/ click the **Create new group** button
- Click the **Select members** button
- After the members have been chosen, click the **Update members** button

If there is a need for changes in a security group, click the **Request changes** button and write the needed change to create a ticket to the support.



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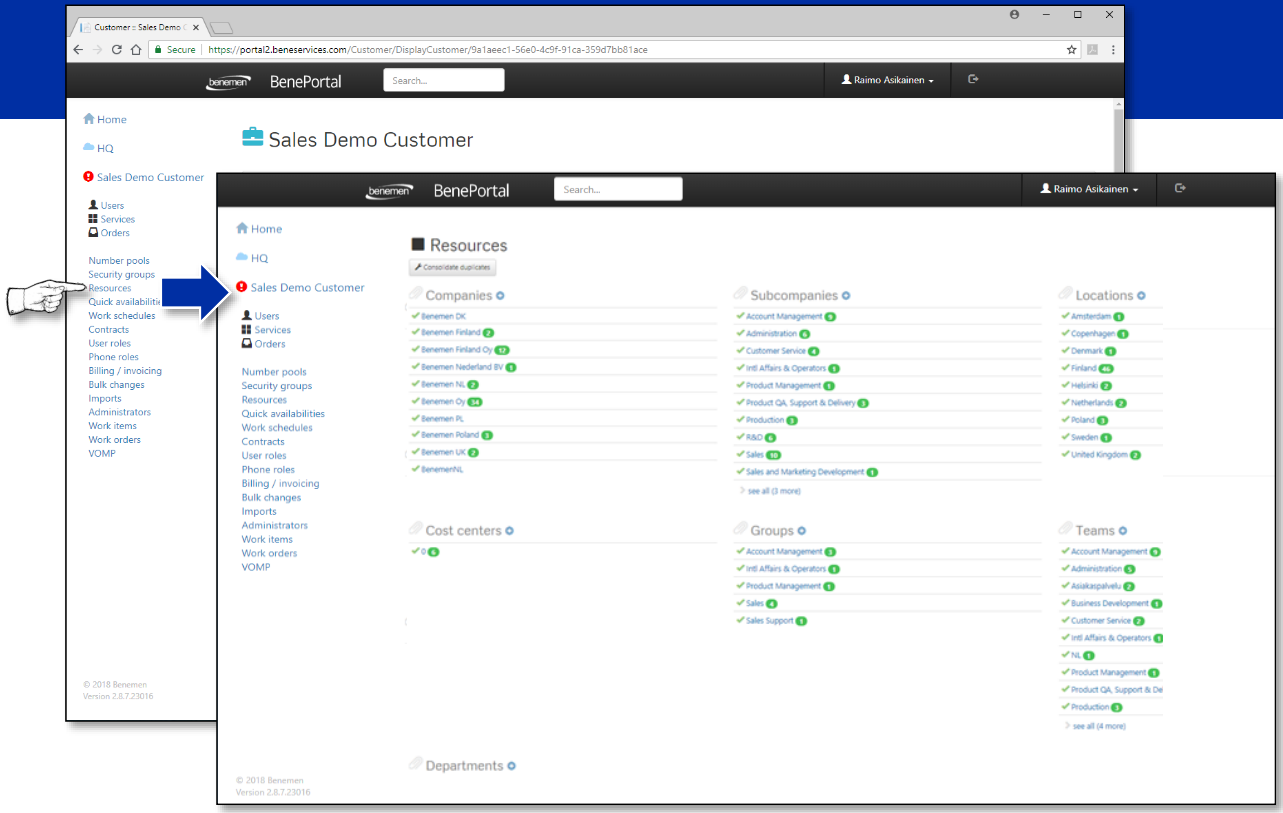
Resources

Resources

On the **Resources** page, the Directory information is listed as groups (see the picture).



BenePortal – Quick Start Guide

Services & Orders

Services

All service products in use (e.g. Skype Integrations and Call Channels) are listed on the Services page.

Orders

All activations, changes and terminations, which require work from the support will be listed on the Orders page until the support has marked them done. The previous and completed works are listed under the waiting orders.