Avaya Meeting Exchange

Wholesaler for Web Portal 3.6
User Guide

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Contents

Chapter 1: Introduction

This chapter describes the Wholesaler product, it's benefits and intended users.

What is the wholesaler and reseller solution?

The wholesaler and reseller solution is a product designed to maximize the expansion capabilities of Avaya's Conference Service Providers (CSP) customers. Wholesaler offers a complete infrastructure for channel management, thus extending the CSP presence both geographically and into different vertical markets.

There are two entities in the Wholesaler model.

- Wholesaler

  A Wholesaler is defined as being the owner of a company or companies. Wholesalers can create and brand companies, clients, resellers, and conferences via the Web, but they cannot access data relating to companies, clients, resellers or conferences owned by other wholesalers.

  - Created using the CRS front end.
  - Optional attribute of a company.
  - Separate web login.
  - Owns the following: companies, clients, DDIs, resellers.
  - Brand their default web interface.
  - Brand individual companies.

- Reseller

  The system owner or a Wholesaler may have a network of Resellers, whose business is to find conferencing customers. Accordingly, the Wholesaler needs to be able to create, edit, and delete Resellers. When creating a company, Wholesalers need to be able to identify the Reseller to be credited for any conferencing revenue. The Reseller is an optional attribute of the company. The Reseller field is included in the billing output. However, it is an optional field when creating a company.

  - Created using the CRS front end.
  - Created using the Web by a wholesaler.
  - Optional attribute of company.
  - Included in billing output.

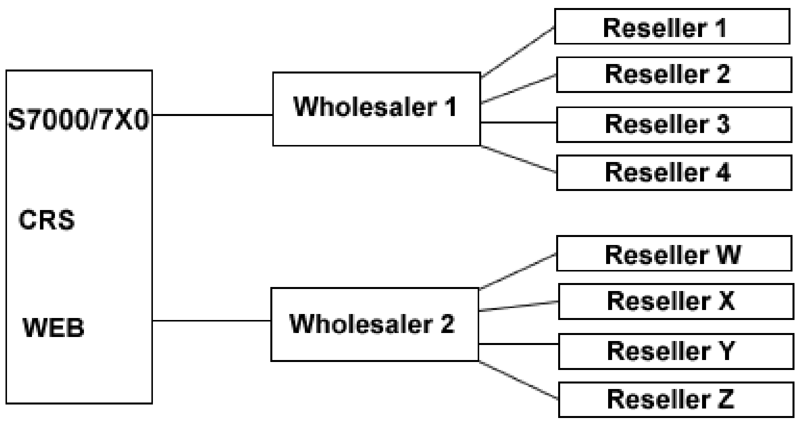
- System Owner

  The system owner is the overall owner of the CRS and Web Portal. They have administrator access to both systems. The system owner can create or disable Wholesalers.

Note:
It is necessary to have a Wholesaler account on the CRS. The system owner can set this up.

Below is an example of a Wholesaler/ Reseller model:

Figure 1: Wholesaler and Reseller Solution



Benefits of the Wholesaler and Reseller solution

The benefits of the wholesaler and reseller solution are:

- Facilitate channel management
- Empower the channel to run their business independently of the CSP.
- Extra Layer of Branding.
- Wholesalers can differentiate from each other.
  - Branding (Web, DDI, email notifications)
  - Call Flow (Competitive emulation, class of service: CS7000 only)

Wholesaler and Web Portal

The wholesaler model provides a wide range of functionality over the Web Portal. This includes:

- Branding

  Each wholesaler can have different web branding for their customers. Web branding is set up by the system owner or the wholesaler.
- Company creation

  Wholesalers can create a new company, or search for existing companies.
- Client creation

  Wholesalers can create a new client, or search for existing clients.
- Reseller creation

  Wholesalers can create a new reseller, or search for existing resellers.
- Conference reservation

  Wholesalers can create a conference reservation and associate it with a particular company and client.

Logging on

1. Start your Web browser.
2. Enter the Avaya Web Portal address in the Address field and press **Enter**.

   The url is: http://<webportal server>/webportal3/provisioning/login.

   The Login screen displays.
3. Enter your e-mail address in the E-mail Field.

   This is provided by your system owner.
4. Enter your password in the Password field.

   This is provided by your system owner.
5. Click **Submit**.

   The Provisioning page displays.

Purpose

This guide describes the Web Portal Wholesaler product and its functionality.

See the following publication(s) for information referenced in this guide but not covered in detail:

- Web Portal User Guide
- Web Portal Administrator Guide
- Operator Guide

Chapter 2: Companies, Clients and Resellers

This chapter outlines how to create, edit and disable Companies, Clients and Resellers.

Companies, clients and resellers are different data structures within the conferencing system. Companies have clients and a company can have an associated reseller. They are differentiated by the available privileges. Before you can start reserving conferences, a company account must be established. Client accounts are then created relative to the company. Conference resources can only be associated with clients.

The Reseller is an optional attribute of the company. The wholesaler uses the information provided by the reselller to add the company to the web portal. When adding the new company, the wholesaler can assign the reseller to the company, ensuring that the reseller is identified and credited for conference revenue generated by the company.

Searching for a Company

Initially, when you log on to the Web Portal, the company search box displays. There are several methods of searching for different company details.

- To find all companies with ‘a’ in their name just enter ‘a’ in the name field and click the search icon.

  All companies with ‘a’ in their name are displayed in the company search popup screen..
- The noted display is sorted by the ▲ icon. Click on the icon beside a field to sort the list relevant to that field details
- To find all companies keep the name field blank and click the search icon.

Note:
The same mechanism applies to searching for a Client and Reseller search.

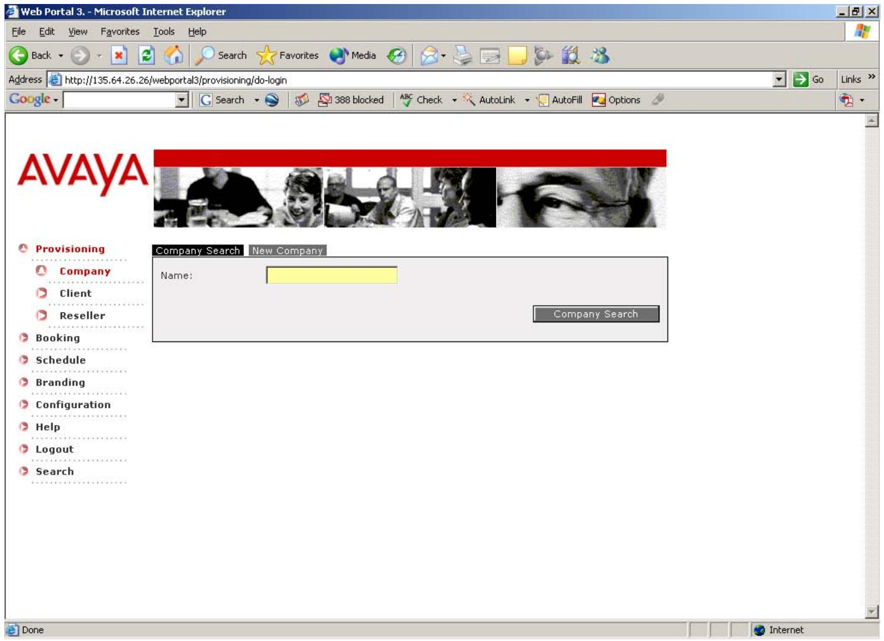
Creating a Company

The company tab enables the wholesaler to create a company over the web.

1. Click **Provisioning**.

   The Company Search tab displays.

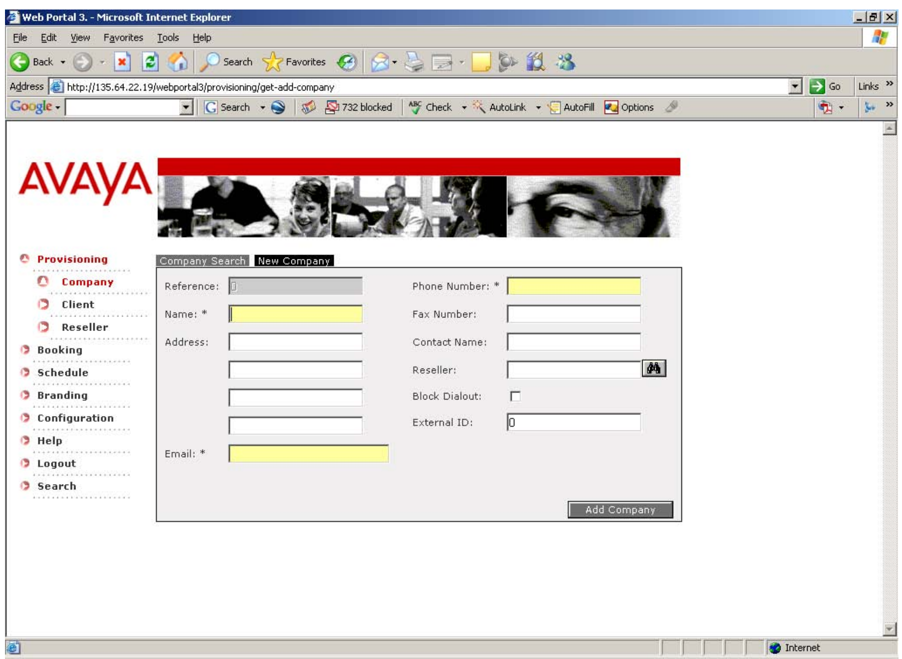
Figure 2: Company Search tab



2. Click **New Company**.

   The New Company tab displays.

Figure 3: New Company tab



3. Enter the relevant details. These include:
   - Name (Mandatory).
   - Address (Optional).
   - Email (Mandatory).
   - Phone Number (Mandatory).
   - Fax Number (Optional).
   - Contact Name (Optional).
   - Reseller (Optional).

     Click the search icon . A popup displays the existing resellers.
   - External ID (Optional). The External ID field is a numeric reference to client details already available on an existing database. This field defaults to ‘0’.
   - Block Dialout (Optional).

   Note:
   Mandatory fields are marked with an ’*’.
4. Click **Add Company**.

   The company is added to the database and is available for selection when creating a client.

Creating a client

Creating a client enables the wholesaler to associate a client with a company. The client account includes details integral to successful conference reservation. It can also be used to manage participant profiles and calling card details. Every reserved conference is associated with a client account.

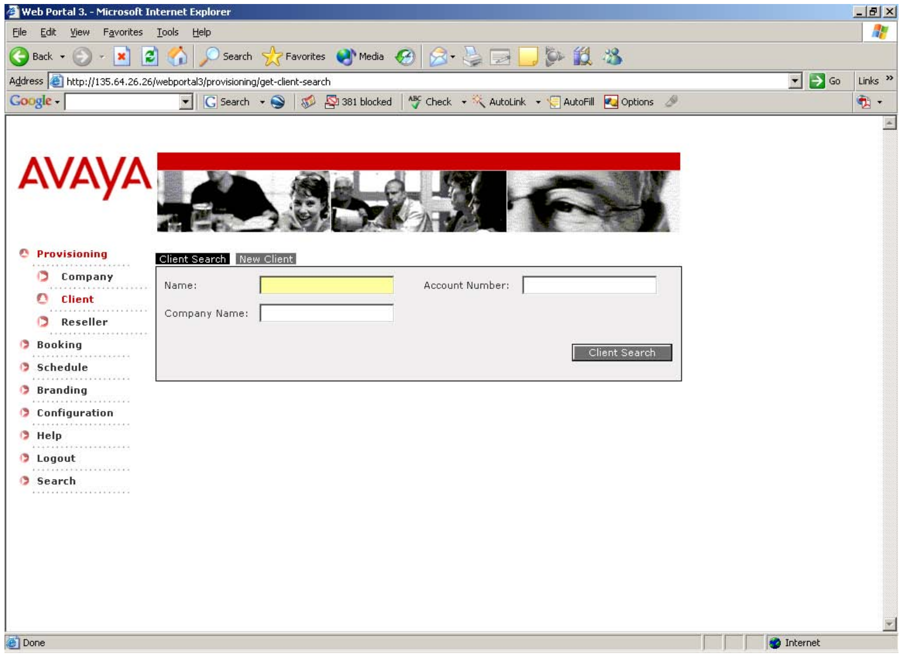
Note:
Client accounts are essentially for billing purposes.

1. Select **Provisioning**.

   The Company search tab displays.
2. Select **Client**.

   The client search tab displays.

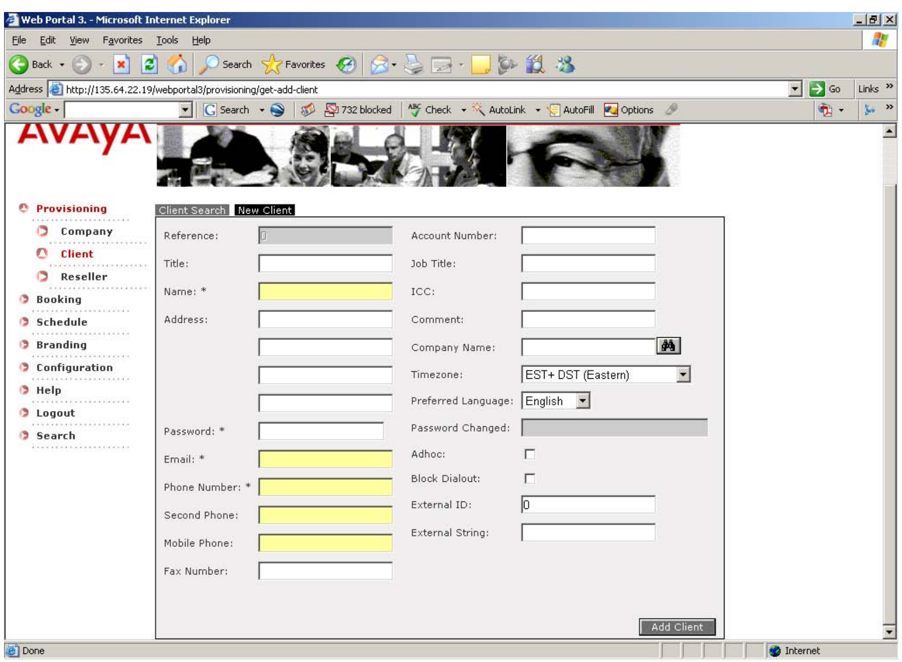
Figure 4: Client Search Tab



3. Select **New Client**.

   The New Client tab displays.

Figure 5: New Client



4. Enter the relevant details. These include:
    - Title. (Optional)
    - Name. (Mandatory)
    - Address. (Optional)
    - Password (Enter a password for the client to enter the Web Portal.) (Mandatory)
    - Email. (Mandatory)
    - Phone Number. (Mandatory)
    - Second phone. (Optional)
    - Mobile phone. (Optional)
    - Fax Number. (Optional)
    - Account Number. (Optional)
    - Job Title. (Optional)
    - ICC (These details are used when billing the client for conferencing services used.) (Optional)
    - Comment. (Optional)
    - Company Name. (Click the search icon to select a company from the popup window.) (Mandatory)
    - Timezone (Select the relevant timezone.) (Optional)
    - Preferred language. (Optional)
    - Password changed. (Display only. You cannot change the content of this field.)
    - Adhoc. (Optional)
    - Block Dialout (Enable to block dialout privileges from a live conferences.) (Optional)
    - External ID (The External ID field is a numeric reference to client details already available on an existing database. This field defaults to ‘0’.) (Optional)
    - External string. (Optional)
5. Click **Add Client**.

    The Client is added to the system. They will have access to the Web Portal interface for conference scheduling, conference management and account control. For more information, see the Web Portal user guide.

Creating a Reseller

Creating a reseller enables the wholesaler to create a person who will obtain conferencing business for them. Reseller details are also included in billing output.

1. Select **Provisioning**.

   The Company search tab displays.

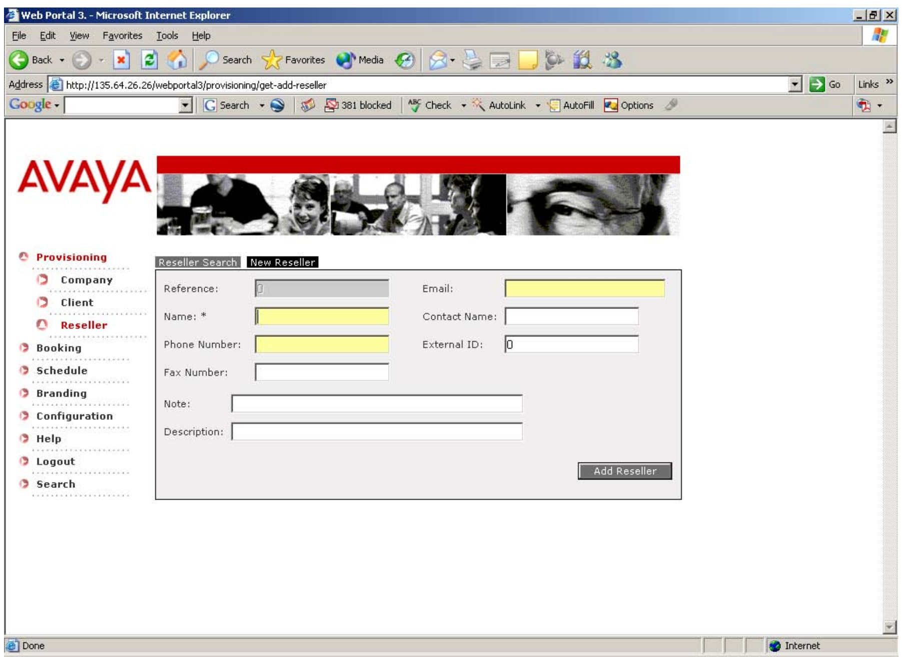
2. Select **Reseller**.

   The Reseller Search tab displays.

3. Select **New Reseller**.

   The New Reseller tab displays.

Figure 6: New Reseller



4. Enter the details as necessary. These include:
   - Name (Mandatory).
   - Phone Number
   - Fax Number
   - Note
   - Description
   - Email

- Contact Name
- External ID (The External ID field is a numeric reference to client details already available on an existing database. This field defaults to ‘0’.)

5. Click **Add Reseller**.

   The Reseller is added to the system.

Editing an existing company’s details

1. Select **Provisioning**.

   The Company Search tab displays.
2. Enter the company name and click **Company Search**.

   The Company Details are displayed.
3. Select **Modify** beside the company that you want to edit.

   The Edit Company tab displays.
4. Edit the details as necessary and click **Update Company**.

   The company details are edited.

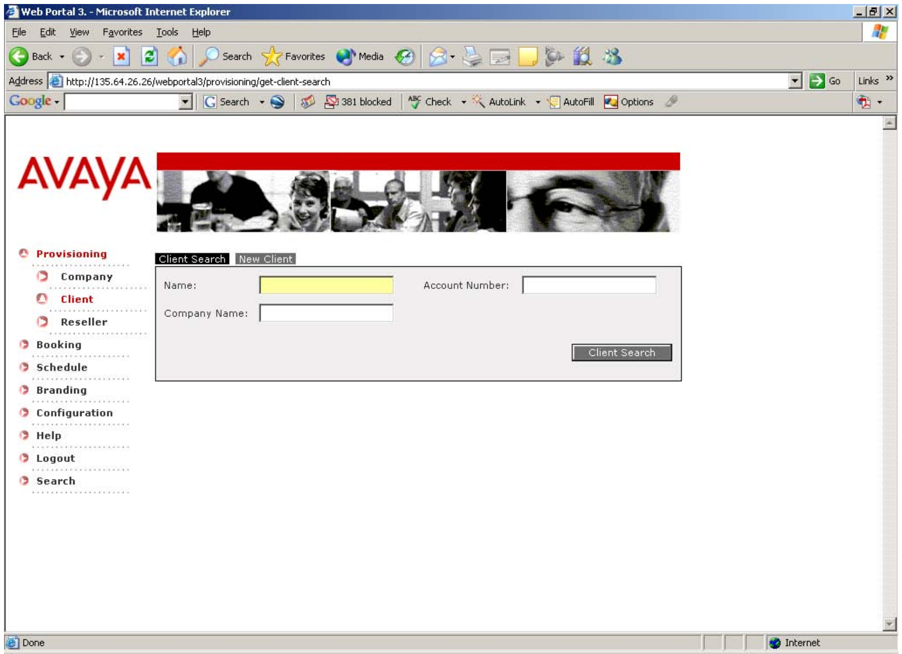
Editing a Client

1. Select **Provisioning**.

   The Company Search tab displays.
2. Select **Client**.

   The Client Search area displays.

Figure 7: Client Search Tab



3. Enter one of the following client details:
   - Name (client's name).
   - Account number (client's account number).
   - Company name (client's company name).
4. Click **Client Search**.

   The Client search results are displayed.
5. Select **Modify**.

   The Edit Client tab displays.
6. Edit the details as necessary and click **Update Client**.

   The client details are updated.

Editing a Reseller

1. Select **Provisioning**.

   The Company Search tab displays.
2. Select **Reseller**.

   The Reseller Search tab displays.

3. Enter one of the following details.
   - External ID.
   - Name.
4. Click **Reseller Search**.

   The Reseller Search results area displays.
5. Click **Modify**.

   The Edit Reseller tab displays.
6. Edit the details as necessary and click **Update Reseller**.

   The reseller’s details are edited.

Disabling a company or client

Disabling a company or client enables a wholesaler to withdraw privileges from an entire company or selected clients. If a company is disabled, associated clients can reserve conferences, however the reservations are disabled on the bridge until the company, or client, is enabled.

Disabling a company

1. Select **Provisioning**

   The company search tab displays.
2. Enter the company’s name or reference number and click **Company Search**.

   The company search results displays.
3. Click **Modify** beside the company that you want to disable.

   The Edit company tab displays.
4. Select the **Disabled** tick box.
5. Click **Edit Company**.

   The edited company displays.

Disabling a client

1. Select **Provisioning**

   The company search tab displays.

2. Select **Client**.

   The client search tab displays.

3. Enter the relevant Client details and click **Client Search**.

   The client search results are displayed.

4. Select the **Disabled** tick box.

5. Click **Edit Client**.

   The client is disabled.

Deleting a Reseller

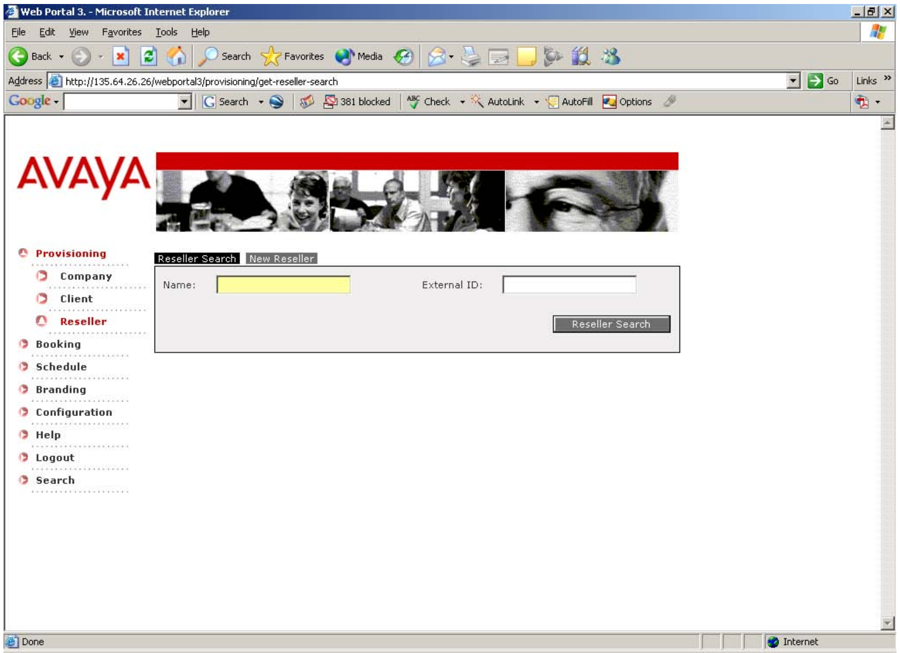
1. Select **Provisioning**.

   The company search tab displays.

2. Select **Reseller**.

   The reseller search tab displays.

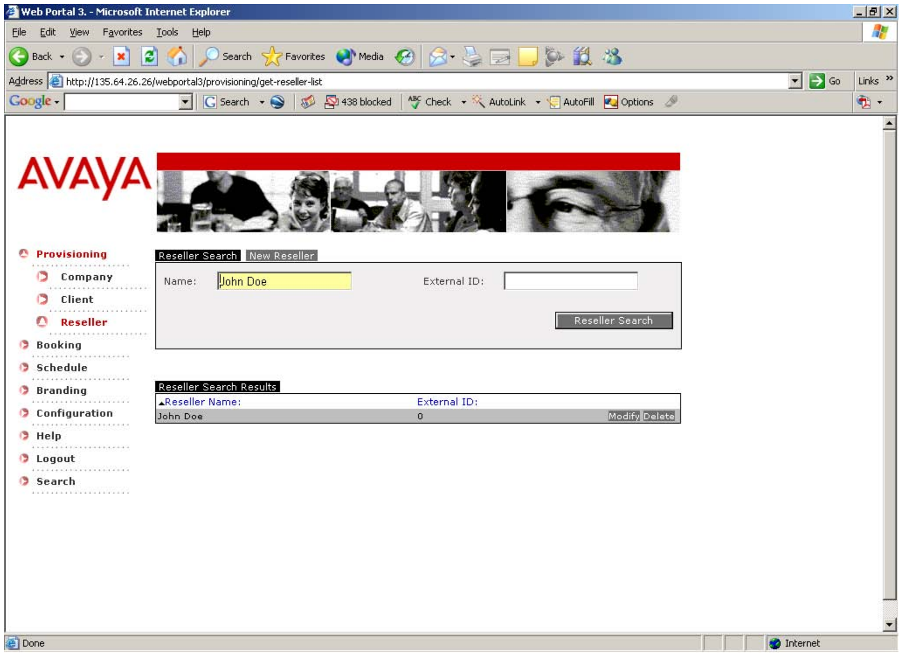
Figure 8: Reseller Search tab



3. Enter the Reseller’s name or external ID.
4. Click **Reseller Search**.

   The reseller search results screen displays.

Figure 9: Reseller search results screen.



5. Click **Delete**.

   The delete reseller dialog displays.

Figure 10: Delete Reseller dialog

6. Click **OK**.

   The Reseller is deleted.

Chapter 3: Booking a conference

This chapter outlines how to reserve a conference using the Web Portal Wholesaler model.

Reserving Conferences

The Avaya Web Portal enables you to create customized conferences to meet your exact requirements. For example, you can create repeating conferences, notify participants by email, and configure various levels of security.

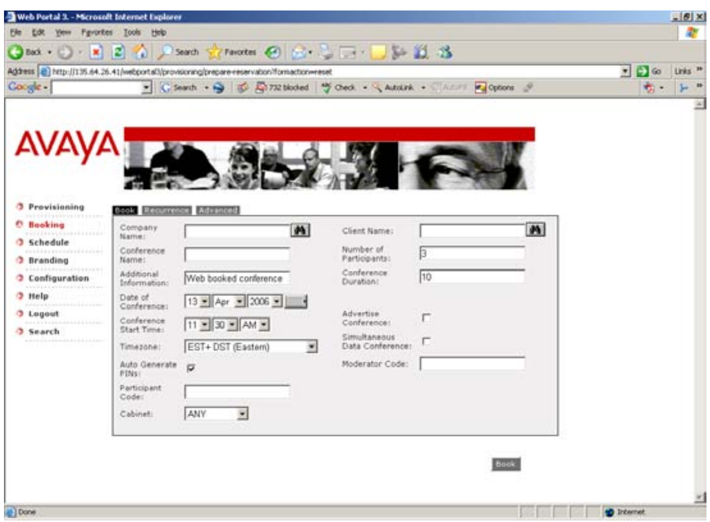
Reserving a conference enables the Wholesaler to create conferences on behalf of new company's clients. Wholesalers can create demand, secure and ordinary meet-me type conferences using the Web Portal.

Booking a conference

1. Click **Booking**.

   The Book Screen is displayed.

Figure 11: Book Screen



2. Enter a company in the **Company Name** area. Alternatively click the search icon.

   All companies are displayed in a pop up screen.

3. Enter the client's name in the **Client Name** field. Alternatively, click the search icon.

   All clients are displayed in a pop up screen.

4. Enter the name of the conference in the **Conference Name** field.
5. Enter the number of participants in the **Number of Participants** field.
6. Select the conference date from the **Date of Conference** drop down list.
7. Select the conference start time from the **Conference Start Time** drop down list.
8. Enter the conference duration in the **Conference Duration** field.

   The minimum and maximum durations are defined using the CRS front end.

9. Select **Advertise Conference** to advertise the conference.
10. Select **Simultaneous Data Conference** to reserve a data conference.
11. Select **Auto Generate PINs** to enable the system to generate the conference access PIN codes.
12. Alternatively, enter your passcodes in the **Participant Code** and **Moderator Code** text areas.
13. Select the cabinet that you would like to reserve the conference on from the **Cabinet** drop down list.

    Note:
    If you select 'Any' the CRS chooses the cabinet that the conference is reserved on.

14. Click **Book**.

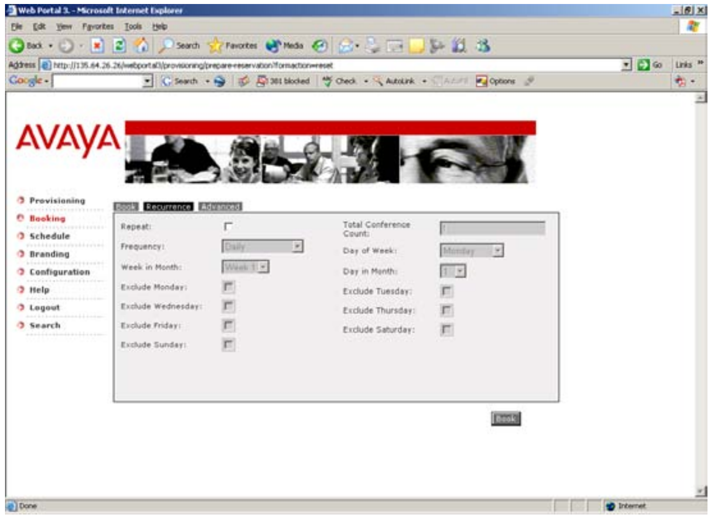
    The conference reservation is complete.

Setting conference recurrence options

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Recurrence**.

   The recurrence tab is displayed.

Figure 12: Recurrence Screen



3. Select **Repeat**.

   The repeat options are enabled.

4. Enter the number of repeats in the **Total Conference Count** section.
5. Select the frequency of the repeating conference from the Frequency drop down list.
   - If you choose Daily, select the days to exclude from the options listed below. For example, you may want to exclude Saturday and Sunday from any recurring reservation.
   - If you choose Weekly or Every 2nd Week, enter the day of the week in the Day of week field.
   - If you choose Week in Month, select the week number from the Week in Month drop down list.
   - If you choose Date in Month, select the date from the Date in Month drop down list.
6. Select the appropriate checkboxes to exclude particular days from the recurrence pattern.

   For example, you may want to exclude Saturdays and Sundays from a daily recurring conference.

7. Click **Book**.

   The reservation screen is displayed.

Note:
A number of these selections can be made before selecting **Book.** The **Book** button is used to submit the overall booking to the CRS.

Selecting a demand conference

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select **Demand Conference**.
4. Click **Book**.

   The conference reservation is created and the Reservations details screen is displayed.

Selecting the conference language

Selecting the conference language enables the user to select the language that the messages are played into the live conference.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select the language that you want the messages to be played in from the Conference Language drop down list.
4. Click **Book**.

   The conference reservation is created and the Reservations details screen is displayed.

Selecting Polling

Polling refers to the process of eliciting participant's views during the conference. The operator asks a question and participants respond by pressing a key on their handset. If you would like to use this feature during a conference, you must enable polling.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select **Polling**.
4. Click **Book**.

   The conference reservation is created and the Reservations details screen is displayed.

Selecting Q+A

A question and answer (Q+A) session gives participants the opportunity to join a queue to ask the moderator a question. Participants are muted until it is their turn to ask a question.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select the **Q+A** check box.
4. Click **Book**.

   The reservation details screen is displayed.

Selecting Broadcast

Broadcast mode means that all participants are muted. In broadcast mode, the moderator can speak to the entire conference without interruption. The moderator can disable broadcast mode at any point and participants are restored to full duplex.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select the **Broadcast** check box.
4. Click **Book**.

   The reservation details screen is displayed.

Enabling Self Registration

Using the Wholesaler Web Interface you can enable Self Registration by:

- Selecting the ’Secure’ check box in the Security section. For more information see Configuring Security Settings on page 32.
- Select the Self Registration check box in the General Facilities.

Note:
For more information see the Self Registration Guide.

Selecting Best Fit

The best fit feature ensures that if the necessary conference resources are not available at the specified conference time, an alternative time and resource combination is offered.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select the **Best Fit** check box.
4. Click **Book**.

   The reservation details screen is displayed.

Selecting a MultiSite Conference

MultiSite dynamically links conferences distributed over bridges located anywhere in the world. A caller dials into a local bridge, joins the local conference, and is connected by audio to other local conferences that make up the global conference.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select the **Multi-Site Conference** check box.
4. Click **Book**.

   The reservation details screen is displayed.

Booking a conference for a Client

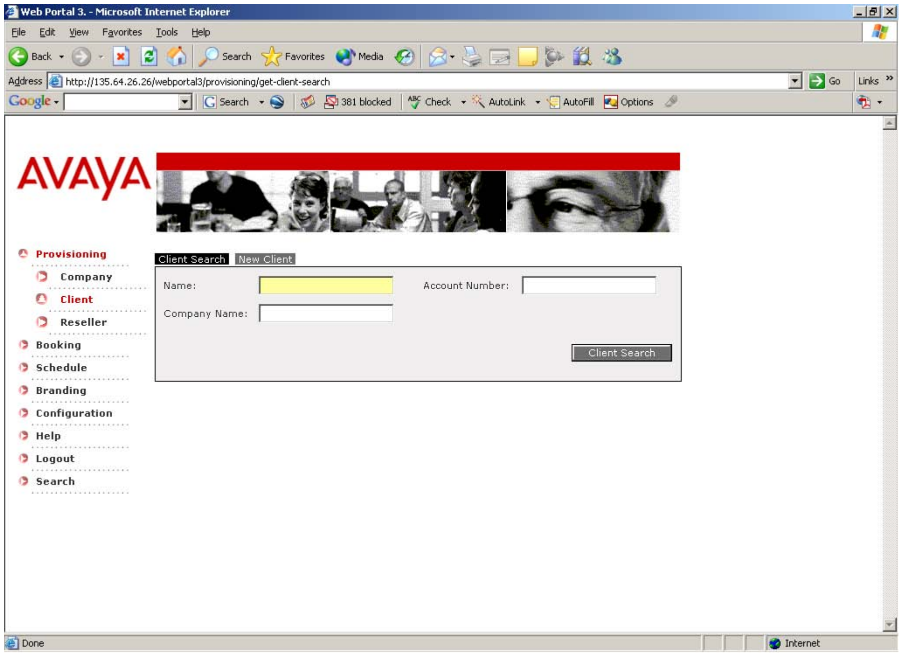
You can book a conference for a selected client using the Wholesaler for Web Portal interface.

1. Select **Provisioning**.

   The Company Search screen displays.
2. Select **Client**.

   The Client Search screen displays.

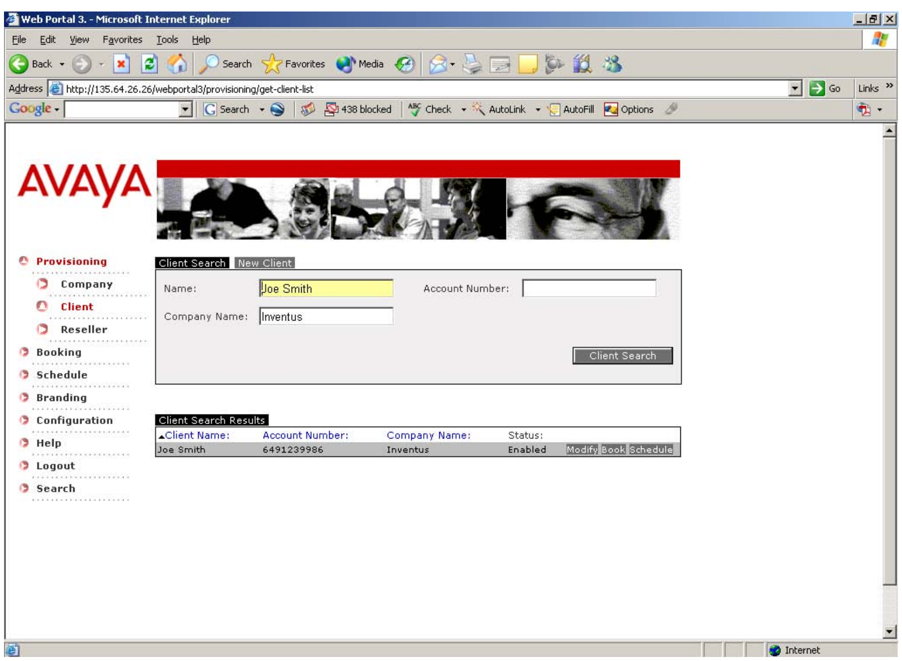
Figure 13: Client Search screen



3. Complete the fields and click **Client Search**.

   The Client Search results screen displays.

Figure 14: Client Search Results



4. Click **Book**.

   The Book screen is displayed. The Client's details are populated in the Client and Company areas.

5. Complete the conference reservation.

   For more information, see Reserving Conferences on page 21.

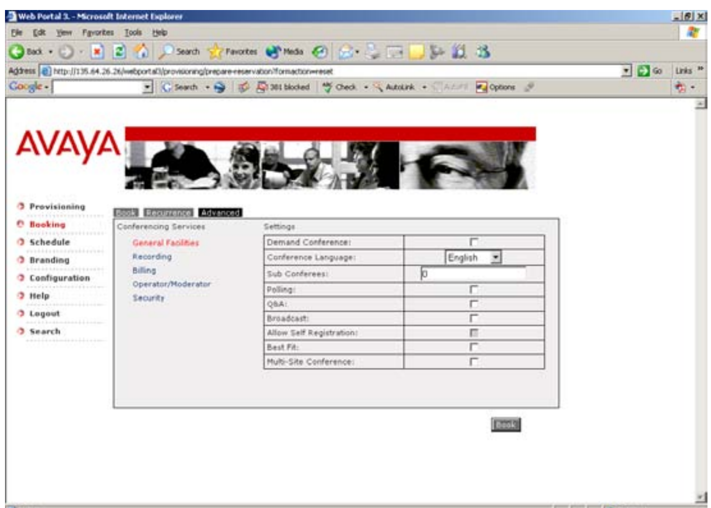
Setting conference recording options (CS7000 only)

Conferences can be recorded and played back after the conference has taken place. Recordings can be stored for a configurable period of time and can be played as many times as needed.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The Advanced tab is displayed.

Figure 15: Advanced tab



3. Select **Recording** from the Conference Services menu.

   The recording tab is displayed.

4. Select the **Recording** tick box.
5. Enter the conference recording access **PIN in the Recording PIN** field.
6. Enter a brief description in the **Additional Information** field.

7. Enter the number of days you would like to store the recording in the **No. of days to store recording** field.
8. Select the **Transfer recording to Tape** checkbox if you would like to receive a taped transcript of the conference.

Note:
It is necessary to select this checkbox to enable the Request Transcript and Mail priority options.

9. Select the Request Transcript of recording check box if you would like to receive a typed transcript of the conference.
10. Select the mail priority from the Mail priority drop down list.
11. Click **Book**.

The conference reservation is created and the Reservations details screen is displayed.

Configuring Billing Settings

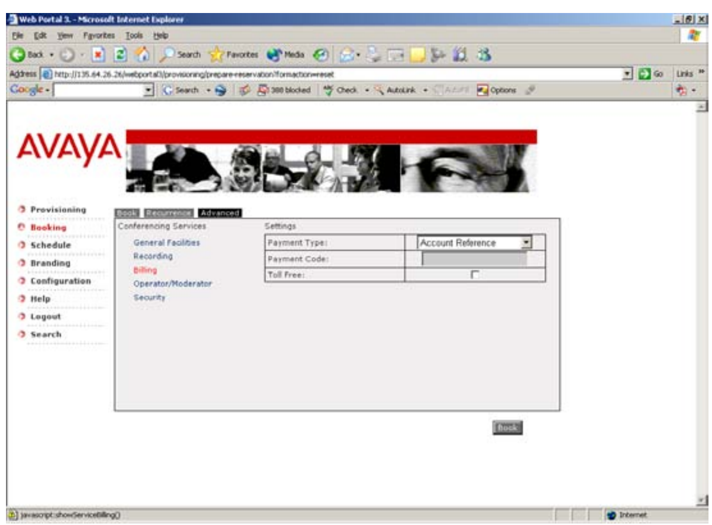
Configuring billing settings enables the user to select the type of billing and what is billed.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

The advanced tab is displayed.

3. Select **Billing** from the Conference Services menu.

Figure 16: Billing Options.



4. Select the billing payment type from the Payment Type drop down list. These include:
   - DN (dial number)
   - ICC (calling card)
   - CLI (call line indication)
   - AR (account reference)
   - ES (external string).
   - UC (user code).
5. Enter the Payment Code.

   Note:
   The Payment Code field is only enabled when ’User Code’ is selected as Payment type. The Payment Code is automatically entered once the booking is done if another code is selected.
6. Select **Toll Free** to associate a toll free DDI with the conference.
7. Click **Book**.

   The reservation details screen is displayed.

Setting Moderator/Operator options

Moderators/ operators are conference facilitators. They manage live conferences using a dual tone multi frequency (DTMF) enabled telephone or the Conference Viewer application. When you associate a moderator/operator with a conference a special moderator PIN is issued. This PIN enables the moderator to access the audio conference with moderator privileges.

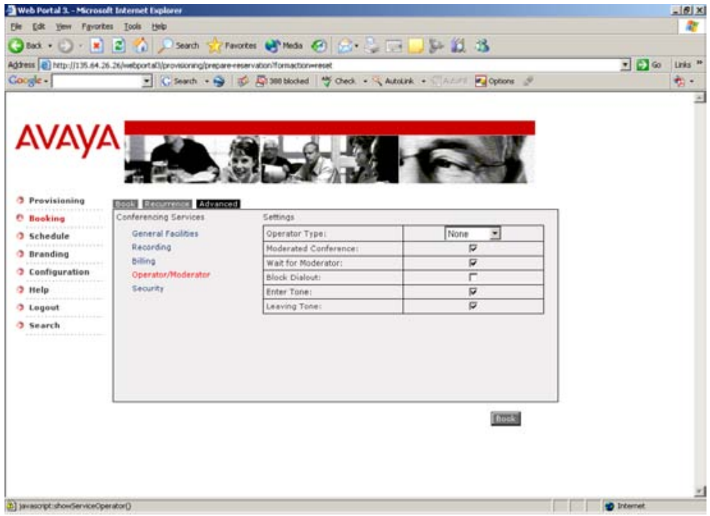
Note:
The DDI must be configured by the system operator and associated with the wholesaler. Otherwise, an error occurs when you click **Book**.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select **Operator/Moderator** from the Conference Services menu.

   The Operator/Moderator Options are displayed.

Figure 17: Operator/Moderator Options



4. Select the Operator Type from the drop down list. The various options are:
   - None:- No operator/ moderator is present during the conference.
   - Assisted:- An operator/ moderator is available should the need arise.
   - Dedicated:- An operator/ moderator views the conference at all times.
5. Select the other relevant Operator/ Moderator options. These include:
   - Moderated conference:- A moderator is assigned to the conference.
   - Wait for moderator:- The conference does not commence until the moderator enters.
   - Block dialout:- Dial out is disabled from the conference.

     The wholesaler can enable block dialout at company, conference and client level. Block dial out is automatically enabled during conference reservation when selected at client level.
   - Enter tone:- A tone is played when a participant joins the conference.
   - Leaving tone:- A tone is played when a participant leaves the conference.
6. Click **Book**.

   The reservation details screen is displayed.

Configuring Security Settings

Configuring security settings enables the user to enter an extra level of security. The available options are:

- Secure

  Secure conferences provide an extra level of security to control access to the conference. In a standard Secure conference, this extra level of security is a user PIN, which is a unique PIN for each individual Participant. This means that each Participant for the conference must be known in advance and they must be provided with their user PIN in advance.

  In a standard Secure conference, Participants must:

  - Dial the DDI
  - Enter their user PIN
  - Enter the conference passcode

    If a Participant enters an incorrect PIN three times, they are placed in reception.

  Note:
  Selecting the Secure option enables Self Registration.

- Roll call

  Roll Call functionality enables Operators to name each line without speaking to each caller individually. If the Roll Call option is enabled, callers are prompted to call out their name as they enter the conference. Their name, as called out, is recorded and Operators can play back this sound file to name the line at their convenience and without interrupting the conference. If the Roll Call option is disabled, callers are not prompted to call out their name as they enter the conference.

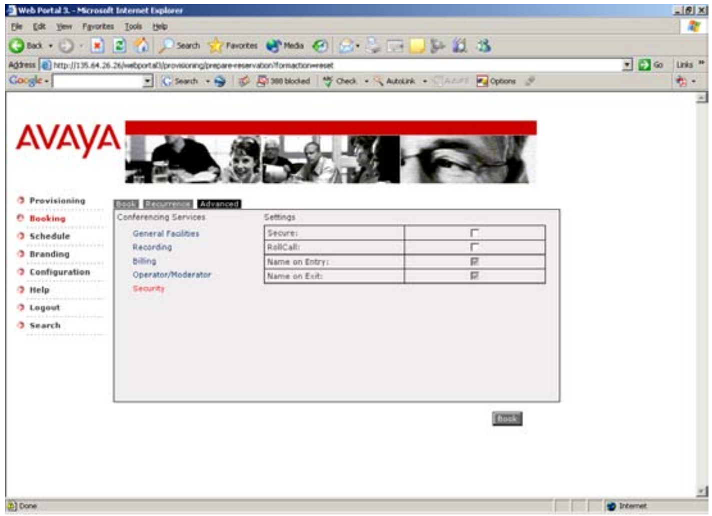
  - Name on entry:- Participants are asked to specify a name when they enter the conference. This option is disabled by default. It is enabled when the Roll Call option is selected.
  - Name on exit:- Participants are asked to specify a name when they exit the conference. This option is disabled by default. It is enabled when the Roll Call option is selected.

1. Complete steps 1-8 in Booking a conference on page 21.
2. Select **Advanced**.

   The advanced tab is displayed.
3. Select **Security** from the Conferences Services menu.

   The security screen is displayed.

Figure 18: Security option



4. Select a security option and click **Book**.

   The reservation details screen is displayed.

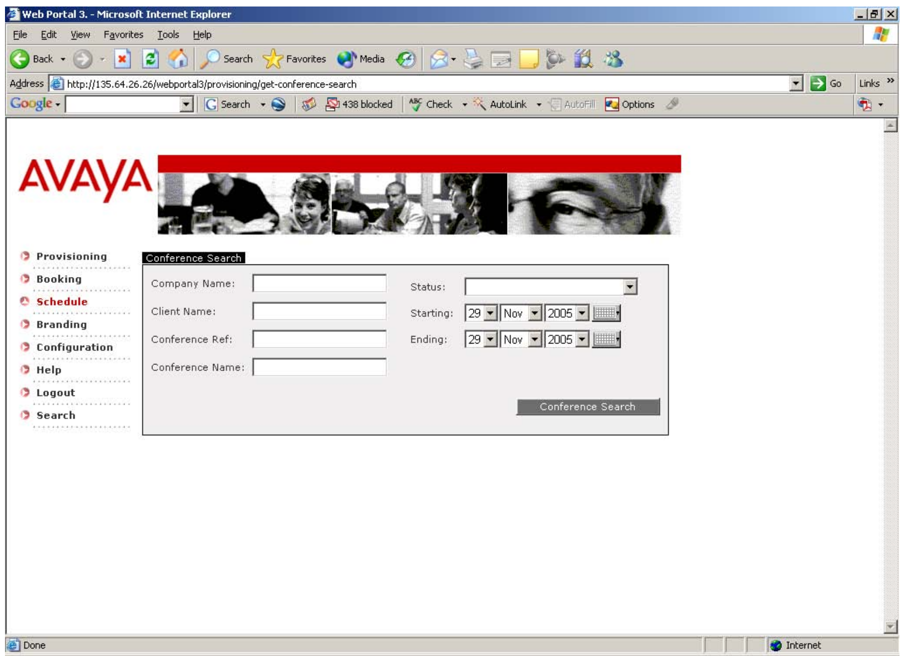
Searching for Conferences

You can search for conferences using the Wholesaler for Web Portal Interface.

1. Select **Schedule** from the left hand pane.

   The Conference Search screen displays.

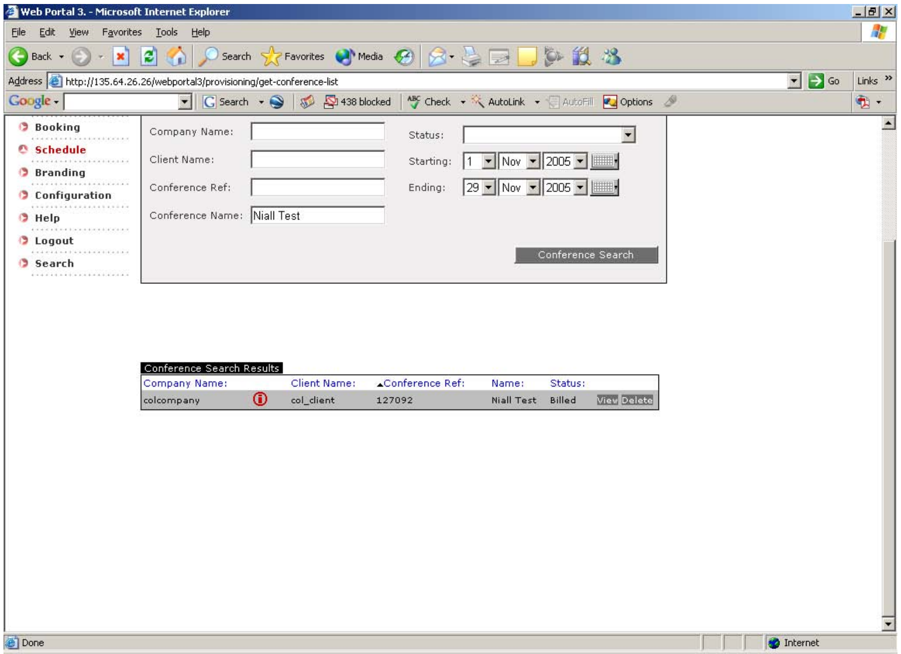
Figure 19: Conference Search Screen



2. Enter the conference reference number in the **Conference Ref** section, if you want to search by conference reference number.
3. Enter the conference title in the **Conference Name** section, if you want to search by conference title.
4. Select the conference status from the **Status** drop down list.
5. Select the date you want the search to start from using the **Starting** drop down list.
6. Select the date you want the search to end at using the **Ending** drop down list.
7. Click **Conference Search**.

   The Conference Search results displays.

Figure 20: Conference Search Results



8. Select **View**.

   The Wholesaler for Web Portal displays the conference details.

Deleting a conference reservation

1. Complete steps 1-7 in Searching for Conferences on page 34.
2. Select **Delete** beside the conference that you want to delete.

   The conference is deleted.

Editing an existing conference

You can edit existing conference reservation details. The editable conference details include:

- Conference duration.
- Number of participants.
- Conference start time.
- Notifications.
- Attendees.

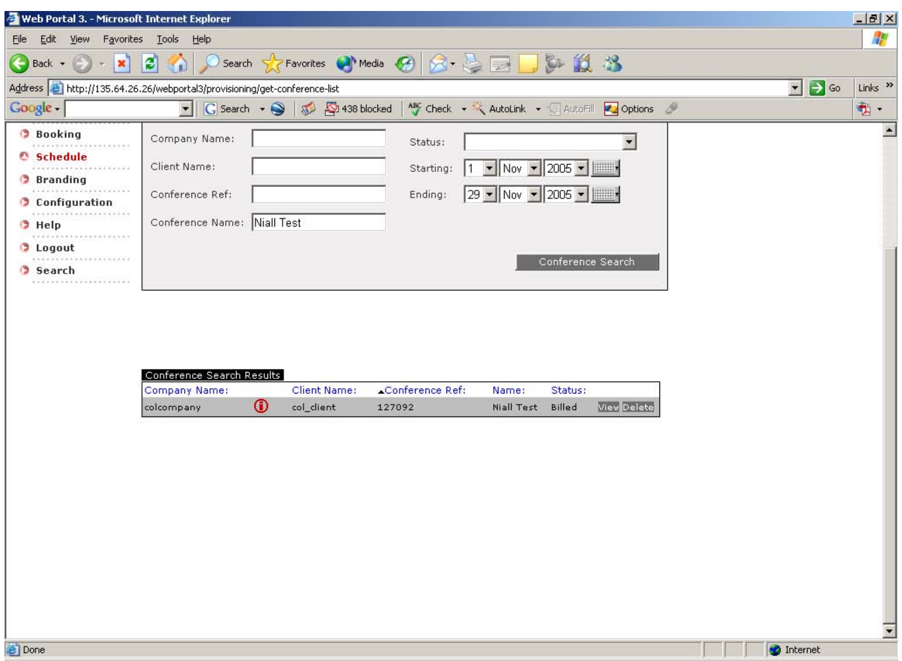
1. Select **Schedule**.

   The conference search screen displays.

2. Enter the reference number or name of the conference that you want to edit.
3. Click **Conference Search**.

   The conference search results screen displays.

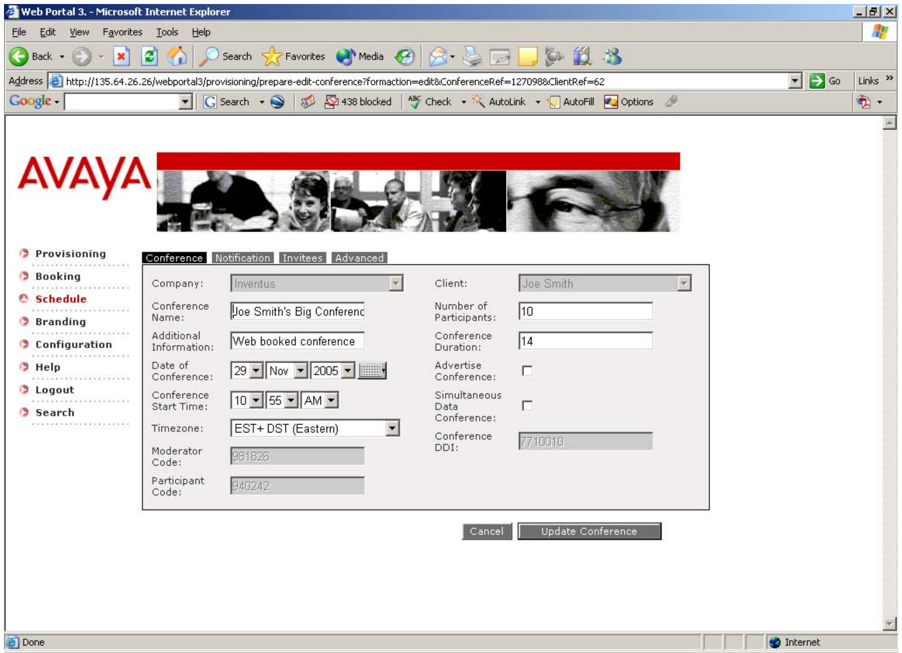
Figure 21: Conference Search results screen



4. Click **Edit**.

   The edit conference screen displays.

Figure 22: Edit Conference Screen



5. Edit the conference details as necessary and click **Update Conference**.

   The conference reservation successfully updates.

Inviting Participants to the Conference

Inviting participants to the conference enables the moderator, who created the reservation, to send an email to selected conferees. The moderator can do this by using Microsoft Outlook or another email application.

Inviting Participants using Microsoft Outlook

1. Complete steps 1-9 in Booking a conference on page 21.

   The Reservation Details screen is displayed.

2. Click **Invite** at the Invite Participants via email section of the Email invitations area.

   An email window is displayed.

Note:
The conference details are automatically entered in the main body of the email. The Web Conferencing access URL is displayed if **Simultaneous Data Conference** is selected during conference reservation.

3. Enter the email addresses of the participants that you want to invite in the **To** or **CC** area.
4. Click **Send**.

   The selected participants receive an email outlining the conference date, time and access details.

Inviting participants using browser email

1. Complete steps 1-9 in Booking Conferences on page 21.

   The Reservation Details screen is displayed.
2. Click **Invite** at the Invite Participants via email section of the Email Invitations area.

   The sending invitations screen is displayed.
3. Copy and paste the text into an email.
4. Enter the email addresses of the participants that you want to invite to the conference in the **To** or **CC** area.
5. Click **Send**.

   The selected participants receive and email outlining the conference date, time and access details.

Inviting Participants from the Web Portal address book

1. Complete steps 1-8 in Booking a conference on page 21.

   The Reservation Details screen is displayed.
2. Click **Invite** at the Invite from on board Address book section of the Email invitations area.

   The Invite screen is displayed.
3. Select the conference chairman by selecting **Chairman** beside one of the members of your address book.
4. Select the tick box beside the other members of your address book that you want to invite to the conference.
5. Click **OK**.

   The selected participants receive an email outlining the conference date, time and access details.

Chapter 4: Wholesaler Branding

The Wholesaler web interface provides branding functionality. You can associate specific branding with a company that is created in the CRS. This functionality permits wholesalers to brand themselves.

The difference between system and wholesaler branding is:

- System owners can brand companies or whole systems. They can also brand companies on behalf of a wholesaler. System branding is implemented on all Web Portal interfaces.
- Wholesalers can brand themselves, or their companies. Both brandings are only implemented on the Web Portal's moderator view, which is accessed using the branding alias.

All companies that the wholesaler creates inherit the branding applied to the wholesaler by default.

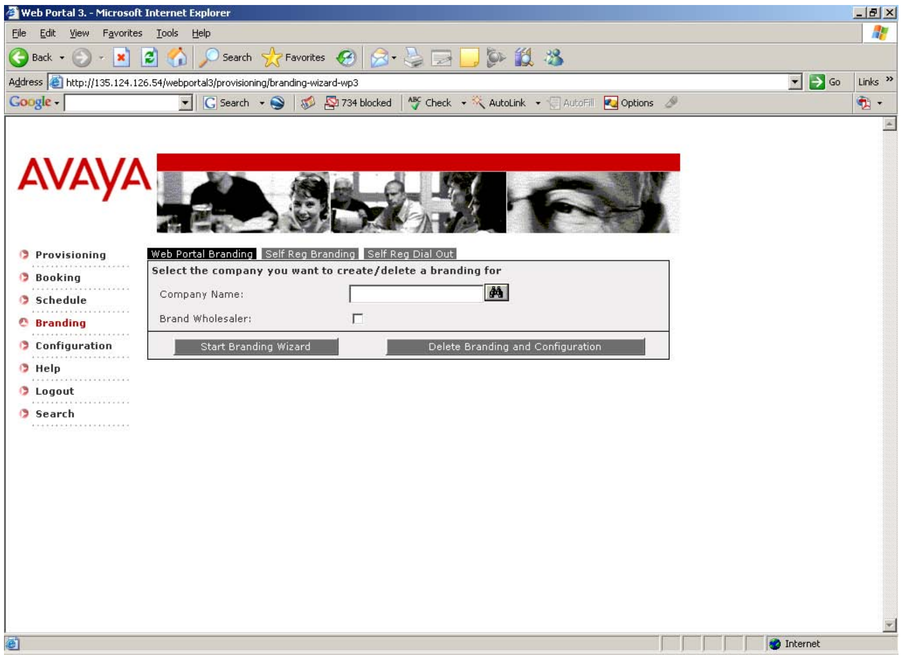
Branding is provided by enabling the Wholesaler to upload a Company Style Sheet, CSS, file and branded graphics. For more information see Branding the Web Portal on page 40.

Branding the Web Portal

1. Select the **Branding** tab.

   The Web Portal Branding tab displays.

Figure 23: Web Portal Branding Tab



2. Select the company that you want to brand by entering the **Company Name** or clicking the search icon.

   Only the company is branded if you select this option.

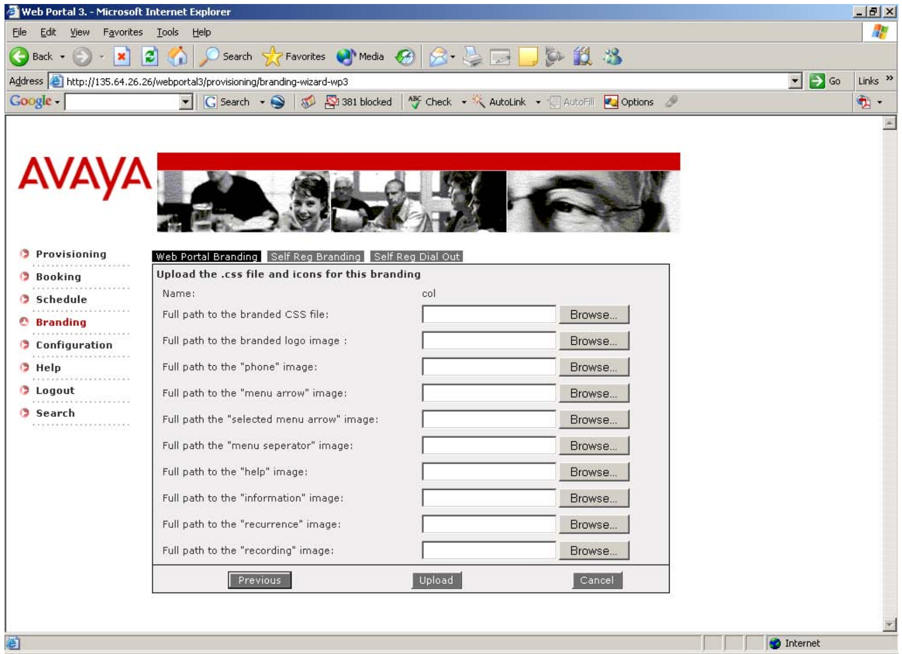
3. Select **Brand Wholesaler**.

   Only the wholesaler is branded if you select this option.

4. Click **Start Branding Wizard**.

   The CSS and image upload screen is displays.

Figure 24: CSS and image upload screen.



5. Complete the fields by click **Browse** and inserting the file location of the css file and graphics.

   The available uploadable graphics are:

   – Branded logo image.

   – Phone image.

   – Menu arrow image.

   – Selected menu arrow image.

   – Menu seperator image.

   – Help image.

   – Information image.

   – Recurrence image.

   – Recording image.

   Note:
   Images used for Web Branding must be .gif files.

6. Click **Upload**.

   The files are stored on a temporary location on the Web Server.

Note:
You are presented with the create branding option once the upload has been confirmed. If the file extensions are not correct an error message displays. Images must be .gif files. The CSS file must have a .css extension.

7. Upload the AAC toolbar icons for this branding.

   This applies to CS700 users only.

8. Upload the AAC participant state icons for this branding.

   This applies to CS700 users only.

9. Click **Create Branding**.

   The branding is applied to the selected company or wholesaler interface. The branding confirmation page is displayed.

10. Note the **Value to use when creating branding for AWC** and the **Moderator login url**.

    These sections contain the company or wholesaler alias.

Note:
The moderator login URL needs to be provided to all clients of the company that you have branded.

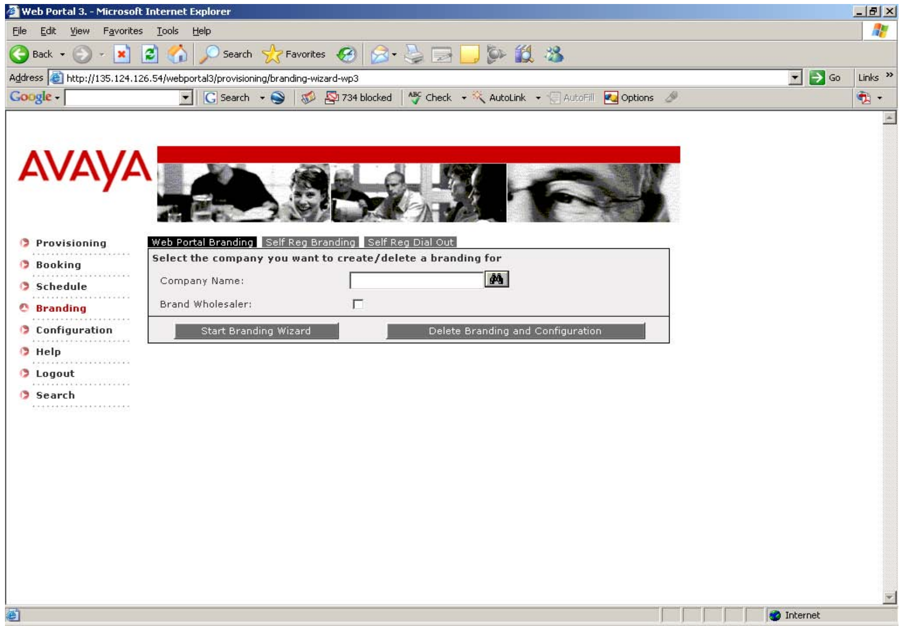
Branding the Self Registration Interface

You can use the wholesaler web interface to brand account for Self Registration.

1. Select **Branding**.

   The Web Portal Branding interface displays.

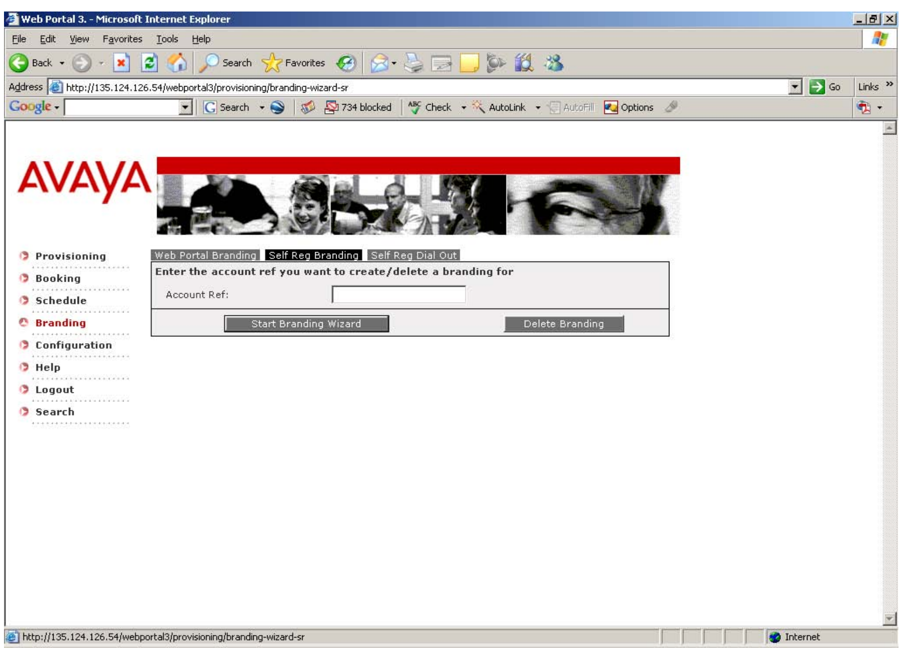
Figure 25: Web Portal Branding Interface.



2. Select the **Self Reg Branding** tab.

   The Self Reg Branding tab displays.

Figure 26: Self Reg Branding Tab



3. Enter the account reference number of the client that you want to brand in the **Account Ref** area.
4. Select **Start Branding Wizard**.

   The Upload css file displays.
5. Complete the fields by click **Browse** and inserting the file location of the css file and branded logo image.
6. Click **Upload**.

   The files are stored in a temporary location on the Web Server.
7. Click **Create Branding**.

   The selected client's interface is branded.

Enabling Self Registration Dial Out

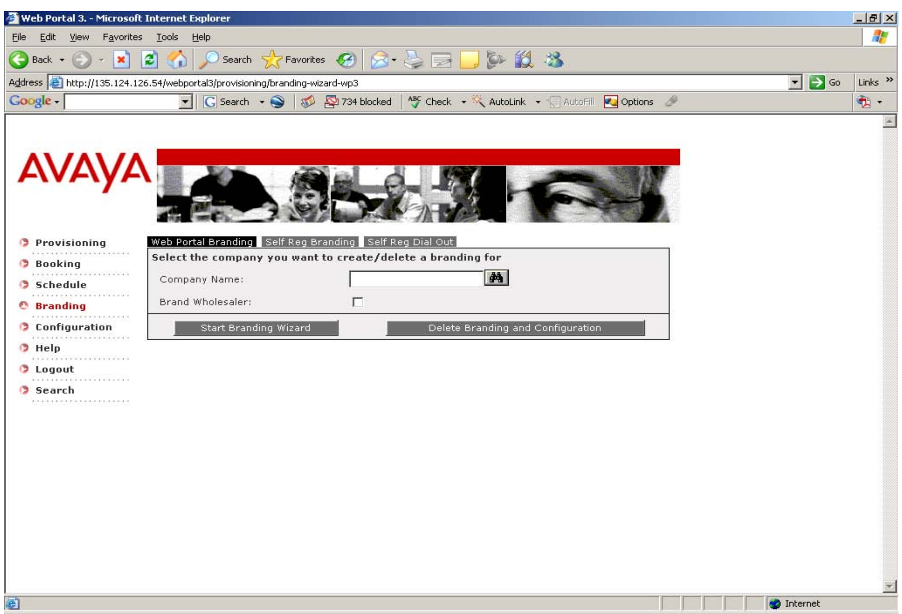
You can enable, or disable, the self registration dial out functionality using the wholesaler web interface. Conference participants use the dial out functionality to bring other participants into the conference.

You can enable the dial out functionality on a client, or conference basis.

1. Select **Branding**.

   The Web Portal Branding interface displays.

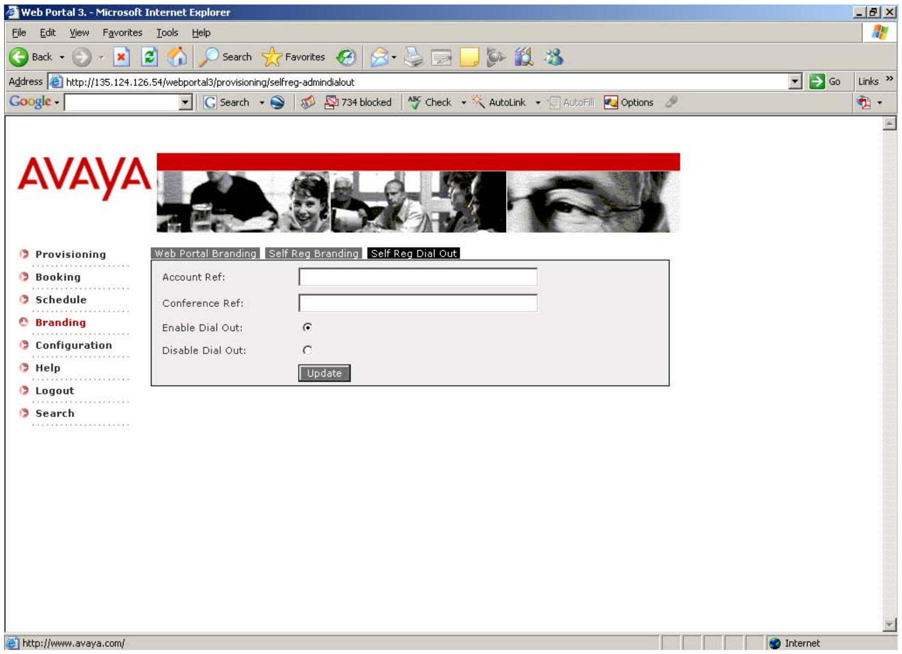
Figure 27: Web Portal Branding interface.



2. Select the **Self Reg Dial Out** tab.

   The Self Reg Dial Out tab displays.

Figure 28: Self Reg Dial Out Tab



3. Enter the account reference number of the client for whom you want to enable, or disable, the self registration dial out function in the **Account Ref** area.
4. Enter the conference number for the conference for which you want to enable, or disable, the self registration dial out function in the **Conference Ref** area.
5. Select **Enable Dial Out** to enable the functionality for the specified client or conference.
6. Select **Disable Dial Out** to disable the functionality for the specified client or conference.
7. Click **Update**.

   The Self Registration Dial Out functionality is either enabled or disabled.

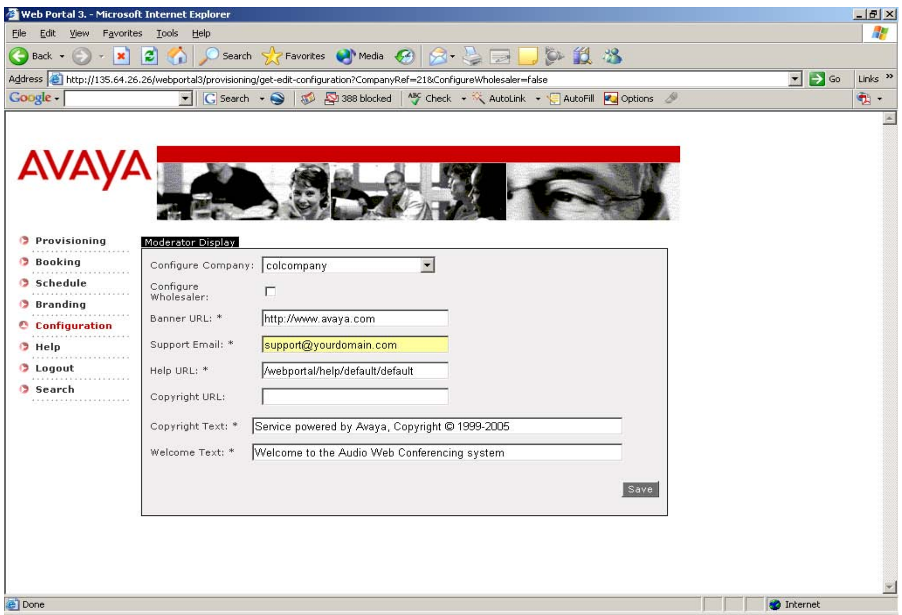
Configuring the Moderator Screen Display

You can edit the appearance of either the company or wholesaler moderator interface. The moderator view is accessed using the branding alias. For more information, see Viewing Brand Alias on page 47.

1. Select **Configuration**.

   The Moderator Display tab displays.

Figure 29: Moderator Display Tab



2. Enter the company that you want to brand in the **Company Name** field. Alternatively click the search icon to view all companies that are stored on the database.

   This company is configured.

3. Select the **Configure Wholesaler** tick box if you want to configure the wholesaler.

   The wholesaler is configured.

4. Enter the company or wholesaler home page in the **Banner URL** area.
5. Enter the company or wholesaler support email address in the **Support Email** area.
6. Enter the URL that opens the online help in the **Help URL** area.
7. Enter the URL that opens the copyright notice in the **Copyright URL** area.
8. Enter your copyright text in the **Copyright Text** area.
9. Enter your welcome text in the **Welcome Text** area.

10. Click **Save**.

    The Moderator Interface is updated.

Note:
Changes are applied on the moderator interface for Company/Wholesaler for which configuration was done.

Searching for Branding Alias

Each company and wholesaler gets an alias after branding is complete. This functionality was introduced to cater for companies with special characters in their titles. For example, AT&T.

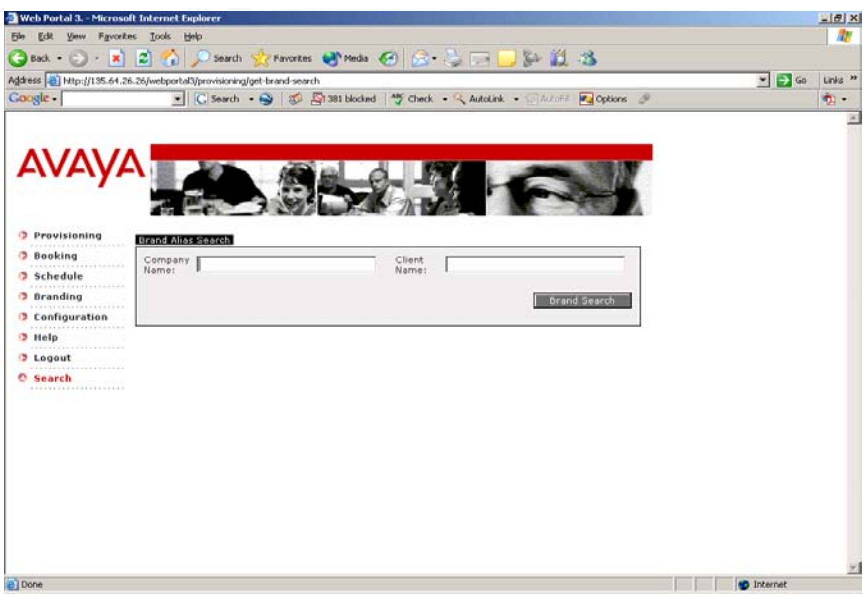
Previously, there were problems accessing the URLs that included characters such as an ampersand (&). The alias is a result of the company or wholesaler branding. You can use the search functionality to get company or client matching search criteria with associated branding alias.

Viewing Brand Alias

1. Select **Search**.

   The Brand Alias Search screen displays.

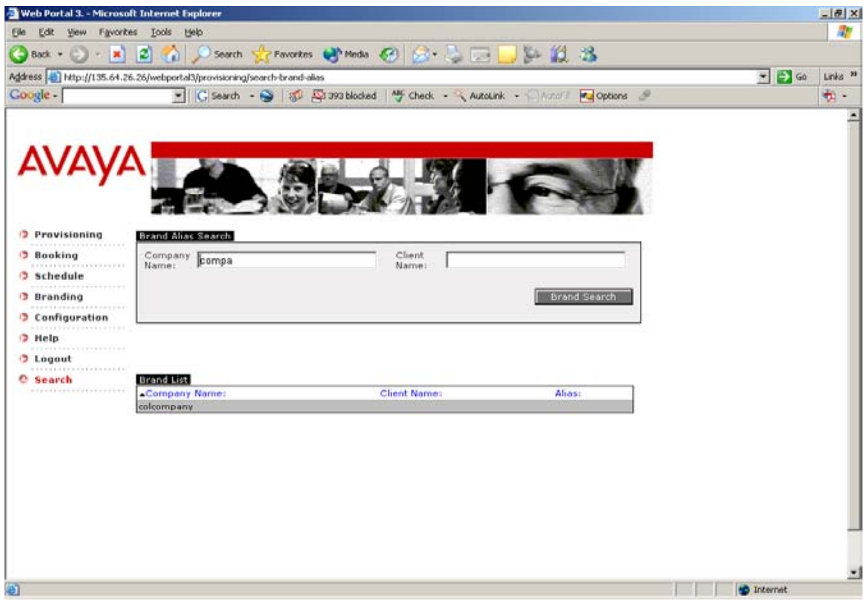
Figure 30: Brand Alias Search



2. Enter the company name in the **Company Name** area, or enter the client's name in the **Client Name** area.
3. Click **Brand Search**.

   The Brand List displays with a list of companies, or clients matching search criteria with branding alias.

Figure 31: Brand List



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