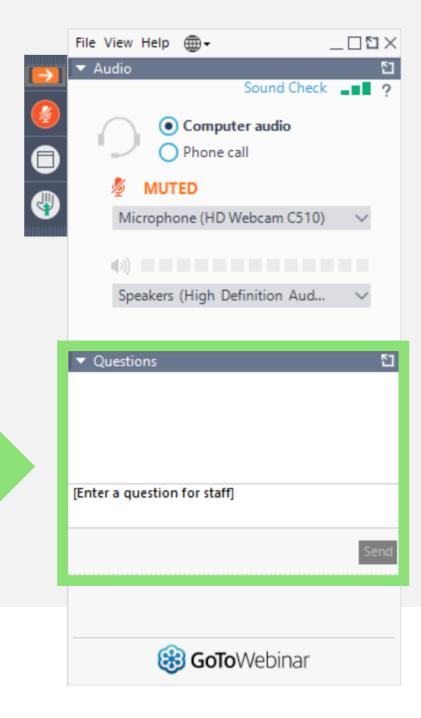


# Success Playbook: Navigating the SMS/800 TFN Registry® UI with Ease

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#### Webinar Control Panel

Submit your questions in the Questions box and our moderator will address your questions live.







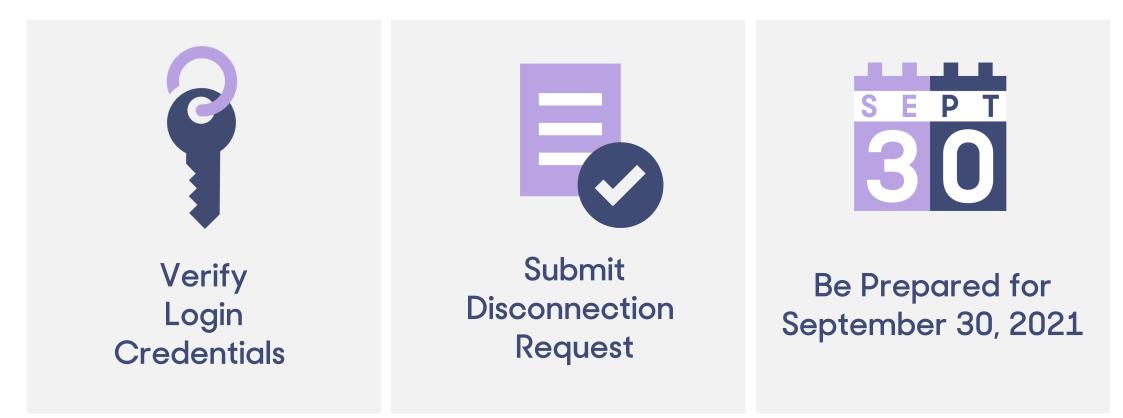
### What we will cover today

- Decommission Information
- Your Resources
- User Interface (UI) Walkthrough
- Questions



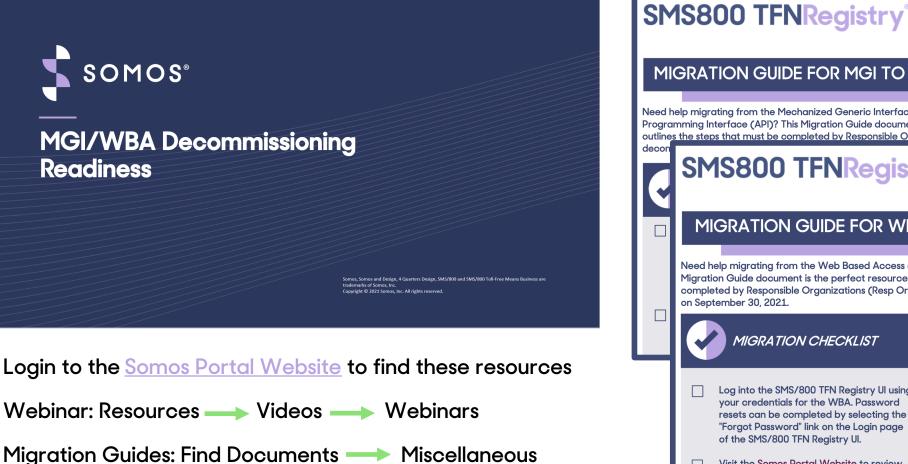
#### It's Right Around the Corner

For all users, both API and UI, please note the following information.





#### **Resources: Migration Guide and Webinar**



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#### MIGRATION GUIDE FOR MGI TO API January 2021 Need help migrating from the Mechanized Generic Interface (MGI) to the SMS/800 TFN Registry<sup>®</sup> Application Programming Interface (API)? This Migration Guide document is the perfect resource for you and your team! It outlines the steps that must be completed by Responsible Organizations (Resp Orgs) in order to prepare for the SMS800 TFNRegistry MIGRATION GUIDE FOR WBA TO UI

January 2021

Need help migrating from the Web Based Access (WBA) to the SMS/800 TFN Registry<sup>®</sup> User Interface (UI)? This Migration Guide document is the perfect resource for you and your team! It outlines the steps that must be completed by Responsible Organizations (Resp Orgs) in order to prepare for the decommissioning of the WBA on September 30, 2021.

#### MIGRATION CHECKLIST

- Log into the SMS/800 TFN Registry UI using your credentials for the WBA. Password
- resets can be completed by selecting the "Forgot Password" link on the Login page of the SMS/800 TFN Registry UI.
- Visit the Somos Portal Website to review on demand SMS/800 TFN Registry UI video tutorials, System How To's and other documentation.

HELPFUL LINKS

Production Environment: tfnregistry.somos.com

Sandbox Environment: sandbox-tfnregistry.somos.com

> Somos Portal Website: portal.somos.com

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API RESOURCES		
DEVELOPER SOMOS PORTAL RESOURCES WEBSITE		
developer.somos.com	portal.somos.com	

API ENVIRONMENTS			
SANDBOX PRODUCTION			
<u>sandbox-api-</u> <u>tfnregistry.somos.com</u>	<u>api-</u> <u>tfnregistry.somos.com</u>		

Note: The Sandbox and Production URLs must be utilized within a *third-party* software such as Postman

#### **UI RESOURCES**

#### SOMOS PORTAL WEBSITE

portal.somos.com

UI ENVIRONMENTS				
SANDBOX	PRODUCTION			

<u>sandbox-</u> <u>tfnregistry.somos.com</u>



#### **Your Resources**

Documentation & Training	Help Desk	Billing	Product Support
Somos Portal: portal.somos.com Developer Resources	24x7 Support 844.HEY.SOMOS (844.439.7666), Option 1	Secure Tunnels (Ports) & RSA Tokens	Questions about your Resp Org's Migration Progress
Portal: developer.somos.com	Email: <u>help@somos.com</u>	Email: <u>billing@somos.com</u>	Email: productsupport@somos.com



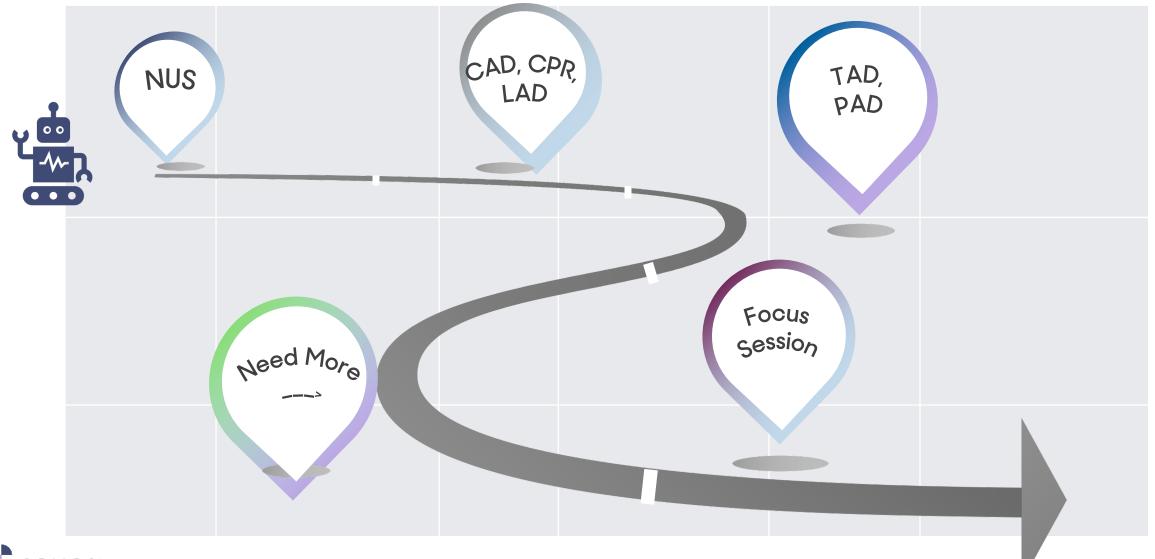
#### Lisa Reich

### User Interface (UI) Walkthrough

Resp Org Trainer

Help Desk Member for 10 years

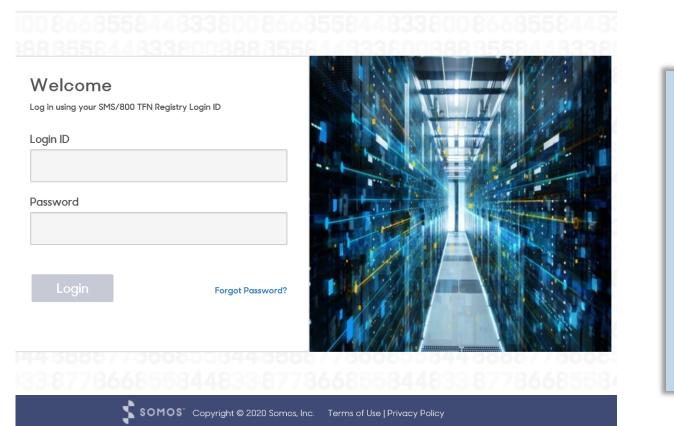
#### **Course Roadmap**







#### SMS800 TFNRegistry



#### Login Credentials

- Enter Logon ID
- Enter Password
  - If you had access in WBA use your last successful password
- Click Login

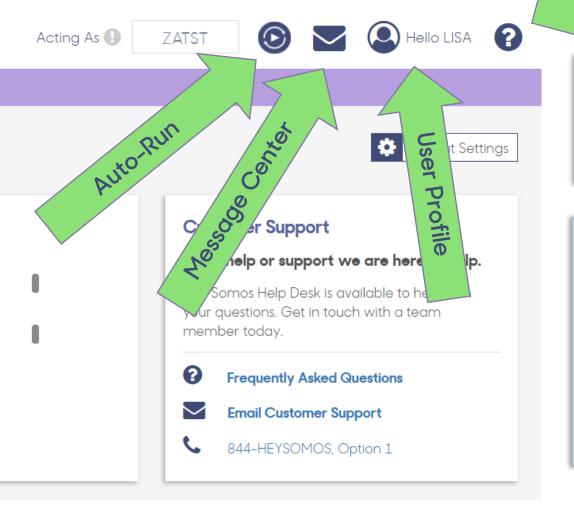


### SMS/800 TFN Registry Landing Page

Message Center Icon which can be easily accessed from any screen within the TFN Registry.

Auto-Run Envelope Icon: returns users enabled Auto-Run job.

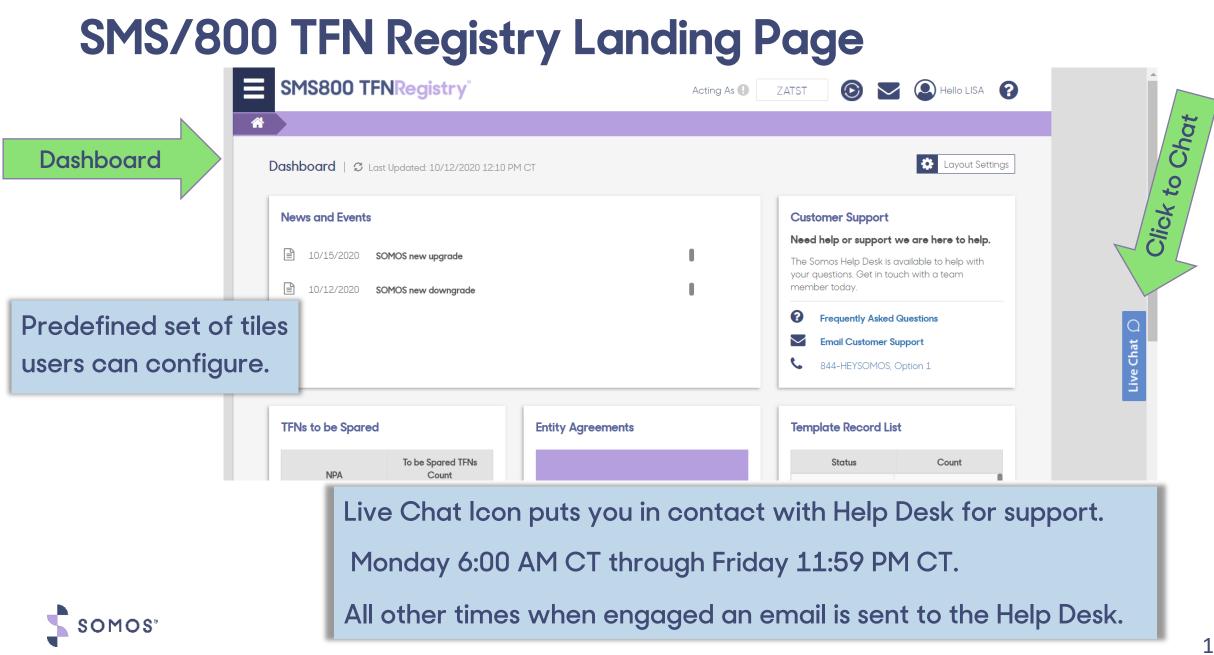
SOMOS"



Help: Directs you to the user guide that is in a PDF format.

Helploon

User Profile Icon "Hello Lisa" this will confirm your login credentials. You can also Change Password, and Logout from this icon.



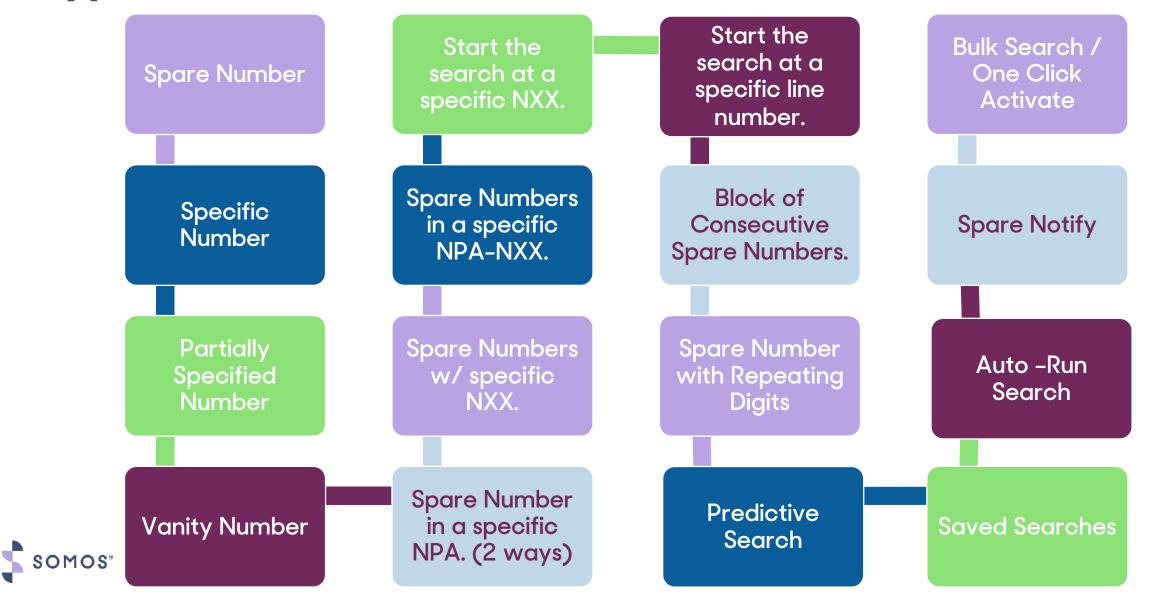
### Accessing the TFN Registry Menu

	SMS800 TFNRegistry			Ac	•
•	Search	Q			
$\wedge$	Number Administration	>	Allowable NPAs (AND)		
	Customer Record Administration	>	Number Search and Reserve (NUS)		
	Carrier Administration		Number Query and Update (NQU)		•
I	IP Customer Record Management		One Click Activate (OCA)	le	
I	System Automation		Reservation Allocation (WRA)		
	General System Administration		Reservation Limits (REL)	D	•
	Network and SCP Administration		Reserved Number List (RNL)		
	Resp Org Management		Trouble Referral Number Query (TRQ)		
	User Management	>			•

- The Menu icon is located in the upper left corner of the page and provides access to additional features of the SMS/800 TFN Registry
- The Search allows a quick way to access information with ease
- The Screen mnemonics are easily accessed (E.g. Type NUS and press enter to navigate to page)
- Mouse over opens to the side more options under each header



#### **Types of Number Searches**



#### **Number Search and Reservation**

#### **Search Section:**

- Actions: shortcut to Reservation Limits
- Quantity: 1-10 /11-500
   (see Bulk / Automation)

		User Subscriptions
Search		user Subscriptions
Actions Reservation Limits	Quantity* 1	Consecutive



Number Formats		Supported formats	Variable	
		800getcoke	Vanity no space or dash	
<ul> <li>You can enter data by copy and paste, manual typing or upload a list of TFN's.</li> <li>Invalid now show with a RED X.</li> </ul>		844-250-3247	Two dashes	
		(833)478-9874	Parentheses and one dash	
		(877)horses1	Parentheses and vanity no dashes	
Search		866.654.3241	Periods between numbers	
Quantity <sup>*</sup> 5	Consec	(800)123.4567	Parentheses and a period	
Actions 844 654.1235 😢 800-get-coke 😢 844-250-3247 😢 833-478-9874 😢 877-hor-ses1 😢 866-654-3214 😢				

Number or Mask Entry: Must be 10 alphanumeric characters, "", "&' and optionally two dashes "-", ", "O". Allowed delimiters are comma, return, colon, semi-colon.

Valid: 5 Invalid: 1 Remove

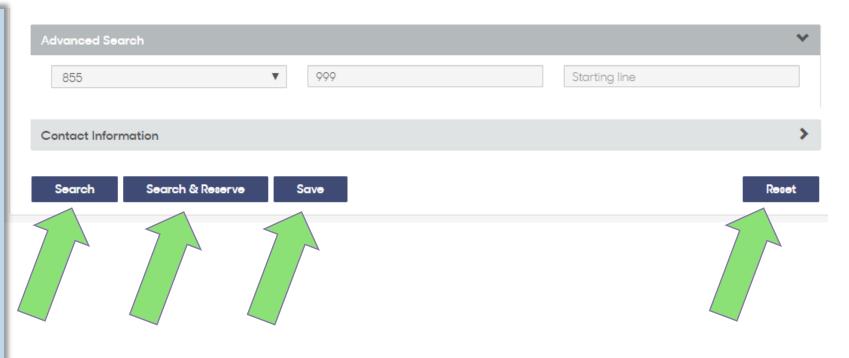
L. Upload



#### **Number Search and Reservation**

- Search Button only works for quantities 1–10
- Search & Reserve for 1-10

   numbers will run and return
   in the search results section
   on the bottom of this screen
- Save to create a saved search
- Reset to clear your search





### **Search Results**

- Search Results section

   will contain the list of
   TFNs (from 1 10) that
   meet the search criteria
- Clicking the right pointing arrow opens more options under the main subject

Somos<sup>\*</sup>

Results			*
Search	Q		Download Print
	Toll-Free Number	Status Me	essage
	833-940-0058	Spare	*
	Resp Org	Status	
		Spare	
	Effective Date	Reserved Until	
	03/20/2019		
	Last Active		
	833-940-0059	Spare	>

- Select to Reserve: Select each box to reserve the TFN(s) (this is only available if the user selected search only)
  - The Top check box is to select all or just for each TFN

#### Number Reservation Details - Not Editable

- Once Reserved you can Review:
  - Resp Org, Status,
     Effective Date,
     Reserved Until, and
     Last Active
- Download and Print:
   See next slide

Results					~
Search	Q				Download Print
	Toll-Free Number		Status	Message	
Resp Org			Status		
ZATST			Reserved		
Effective Date			Reserved Until		
05/10/2019			06/24/2019		
Last Active					
Reserve					
	SOMOS" Copyrig	ht © 2019 Somos, Inc	. Terms of Use   Privacy Policy		



#### **Download and Print Options**

Download

	А	В	C	
1	Quantity	10		
2	Consecutive	No		
3	NPA			
4	Start NXX			
5	Start Line			
6				
7		Contact Information		
8	Contact Name	LISA REICH ZA - DELTA		
9	Contact Number	844-437-7666		-
10	Notes			
11				
12		Search and/or Reserve Results	- 1	
13	Toll-Free Number	Status	Mess	
14	833-913-0158	Spare	- 1	
15	833-913-0159	Spare	- 1	
16	833-913-0160	Spare	- 1	
17	833-913-0161	Spare	- 1	
18	833-913-0162	Spare		
19	833-913-0163	Spare		
20	833-913-0164	Spare		
21	833-913-0165	Spare		
22	833-913-0166	Spare		
23	833-913-0167	Spare		
24				
25				
26			- 1	
27			- 1	
28			- 1	
29			- 1	
30				
31			- 1	
32			- 1	
	<ul> <li>→ Numb</li> </ul>	er Search and Reserve 🔶		
Rea	dy			

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Print and Download icons are common functions for all features within the SMS/800 TFN Registry and the icons appear on the top right of pages when applicable

Print

Download the data in an Excel Comma Separated Values (CSV) format

Print is the format as shown

Search and/or Reserve Results			
Free Number	Status	Message	
3-913-0158	Spare		
3-913-0159	Spare		
3-913-0160	Spare		
3-913-0161	Spare		
3-913-0162	Spare		
3-913-0163	Spare		
3-913-0164	Spare		
3-913-0165	Spare		
3-913-0166	Spare		
3-913-0167	Spare		

Number Search and Reserve

Start NXX:

Start Line:

Number Search and Reserve

Contact Information

Consecutive: No

844-437-7666

LISA REICH ZA - DELTA

4/2/2019

Quantity: 10

Contact Name

t Number

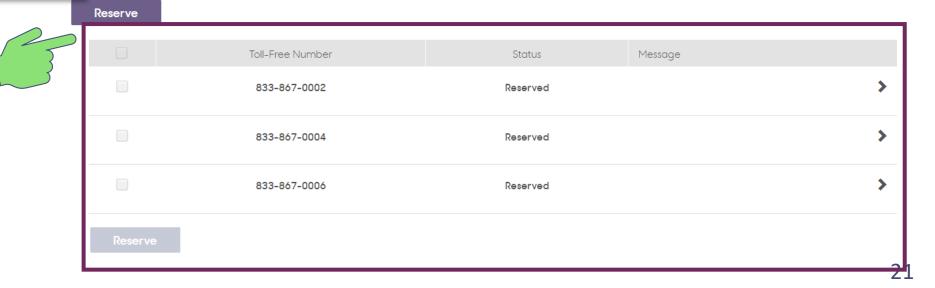
1/1

### **Reserving a Spare Number**

#### Complete your search

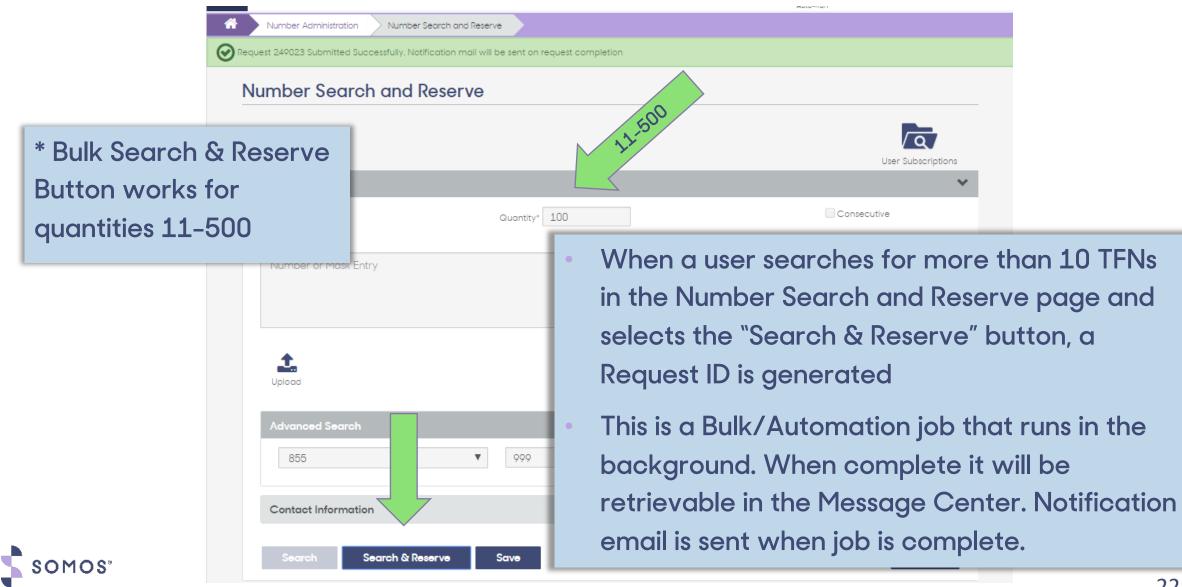
- Checkmark the Dial Number(s) in the Search Results area
- Click the Reserve button
- Once Reserved the number Status is changed to Reserved

Toll-Free Number	Status	Message
833-867-0002	Spare	>
833-867-0003	Spare	>
833-867-0004	Spare	>
833-867-0005	Spare	>
833-867-0006	Spare	>





#### **Bulk Number Search and Reserve**



#### **Reserved Number List (RNL)**

		Registry°		Acting As ① ZATS	· • © 💌	Hello -SB-ZA-Liso	a 😮
	Number Administration	Reserved Number List					
	Reserved Number L	ist					The RNL window displays a
	Search	Q				Download	list of numbers that were
_	T-II For Alteration		Reserved Date	Reserved Until Date	Contact Person	Contact Nu	reserved by a specific
Sear	ch Field:	_	08/04/2020	09/18/2020	Jessica Iverson	844-439-7	SMS/800 Toll-Free Number
	Entor oposifia		08/04/2020	09/18/2020	Jessica Iverson	844-439-7	
	Enter specific	adia or	08/04/2020	09/18/2020	Jessica Iverson	844-439-7	Registry user (Logon ID)
	specific to find	l data	08/04/2020	09/18/2020	Jessica Iverson	844-439-7	
	-	NIT	08/04/2020	09/18/2020	Jessica Iverson	844-439-7	The RNL will show all under
	833-964-1606	No	08/04/2020	09/18/2020	Jessica Iverson PFEILSCHIFTER,AMY	844-439-7	Deep Ore that you are
	833-946-0523	No	08/12/2020	09/26/2020	PFEILSCHIFTER,AMY	888-767-3	Resp Org that you are
	833-946-0524	No	08/12/2020	09/26/2020	PFEILSCHIFTER,AMY	888-767-3	Acting As
	833-946-0528	No	08/12/2020	09/26/2020	PFEILSCHIFTER, AMY	888-767-3	0
	10/35				<< 1	4 > >> 10	RNL can be downloaded and printed
	Refresh						
s s	5	SOMOS	Copyright © 2020 Somos, Inc	c. Terms of Use   Privacy Policy			23

#### **CAD - BASICS**

New in article Dutters	Customer Record		
Navigation Buttons:	Customer Record Data: 833-534-0535		
Retrieve			
• Edit	Effective Date, Time and Status:		🖸 🛍 土 📥 🖨
• Сору	Actions 09/14/2021 - 05:15 AM CT - Pending		ansfer Delete Upload Download Print
• Transfer	Basic Customer Record (CAD)	Call Processing Record (CPR)	Label Definitions (LAD)
Delete	Customer Record Administrative Information *		*
<ul> <li>Upload</li> </ul>	Resp Org * BRSAC	Customer ID	High Priority
<ul> <li>Download</li> </ul>	Agent ID	Telco	
Print	End Subscriber Name	BRSA	
The DARK blue	End Subscriber Address		
notes that tab			
contains data	Service Order S6547896	Supplemental Form	0.
	30347070		
SOMOS	Last Changed	Approval	

### **CAD - BASICS**

Action Gear:

- Customer Record Audit/Resend (CRR/CRA)
- Customer Record Selection (REC)
- Immediate Validation Results (IVR)
- Summary and Details of Carrier Approval (SAP/DAP)

stomer ke	cord Data: 833-534-0535		
Actions	Effective Date, Time and Status:		Transfer Delete Upload Download Print
	Customer Record Selection	Call Processing Record (CPR)	Label Definitions (LAD)
	Immediate Validation Results		
Cust	Summary and Details of Carrier Approval		<b>v</b>
Resp (	Drg *	Customer ID	High Priority
BRS	AC		
Agent	ID	Telco	
		BRSA	
End Su	ubscriber Name		
End Su	ubscriber Address		
Servio	ce Order	Supplemental Form	
S65	547896		•



### **Basic Customer Record (CAD)**

#### **Required Fields:**

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- **Toll-Free Number**
- Effective Date / Time
- Resp Org ID
- Service Order OR • Supplemental Form

eve: Toll-Free Number: 833-534-0535		
ts: Effective Date, Time and Status: 10/28	8/2021 - 04:15 AM CT 🖌	
tions		Transfer Delete Upload Download Print
Basic Customer Record (CAD)	Call Processing Record (CPR)	Label Definitions (LAD)
Customer Record Administrative Informatic	on *	~
Resp Org *	Customer ID	High Priority
BRSAC		
Agent ID	Telco	
	BRSA	
End Subscriber Name		
End Subsoriber Address		
Service Order	Supplemental Form	
S6547896		<b>0</b> .
End Intercept	Referral	
MM/DD/YYYY	Select	~

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### CAD - AOS

Selecting the Areas of Service (AOS) drop down menu shows all five types of service, which are:

- Network
- State
- NPAs
- LATAs
- Labels

\*Required Field

Areas of Service *	*
Networks	~
Network Values	Delete
States	>
NPAs	>
LATAs	>
Labels	>
Carriers *	>
Destination *	>
Contact Information	>



#### **CAD - Carriers**

Carriers *	
IntraLATA Carriers	~
Carrier Values 📰 XAC 9921 🔀 ZCC 9903 🔀 ZDC 9904	Delete
ZGC 9907 1 -	
InterLATA Carriers	~
Carrier Values	Delete
X         SMS         9902         X         ZAC         9921         X         ZCC         9903         X         ZDC         9904	
🔀 ZGC 9907 1 -	

- You can enter part or all of the ACNA or CIC
- User can add the
   InterLATA/IntraLATA Carrier
   by accessing the Carrier
   Values stack menu
- \*Required



#### **Destination Numbers**

Destination '	*			*
				Add Delete
	Destination Number *	Number Of Lines *	LSO	FSO
×	833-534-0535	1000		
Contact Info	ormation			>

- Destination can be a Toll-Free Number (TFN) or Plain Old Telephone Service (POTS) number
- \*Required



#### **Contact Information**

Contact Information	×
Contact Name -SB-Reich, Lisa	Contact Number 844-439-7666
Notes	
Contact Name, Contact Num	nber, and Notes
	used on the NUS window is carried over and
may be modified, if necess <ul> <li>This is auto populated</li> </ul>	sary



### Call Processing Record - CPR

Basic Customer Record (CAD)	Call Processing Record (CPR)	Label Definitions (LAD)
		Delete
all Processing Record		~
Primary IntraLATA Carrier	Primary InterLATA Carrier	
Select	✓ Select	~
Time Zone		
CT (Central)	✓ 🗸 Daylight Savings	
Call Processin	a Record:	
Prime	iry IntraLATA Carrier & InterLA	TA Carrier - These can be used if you
have	one InterLata and one IntraLata	acarrier

- Time Zone Default value is Central Time (CT)
- Daylight Savings Allows a user to unselect the default option of observing Daylight Savings time for this CPR





- Columns and Rows: the CPR allows a display of 10 Rows and 10 columns at a time with scroll options to display up to 1000 rows and 20 columns
- Headers names are selected via a drop-down menu

Con	figure Call Processing				*
	on Name AIN 🗸	Search Select	• Q	Add Row	Add Column Delete Tree
	LATA 🗸	Area Code 🗸 🗸	NXX ~	Carrier 🗸	Tel #
	*LATAS			ZAC-9921	833-534-0535
	664	505	*INXS	ZDC-9904	833-534-0535
	664	505	OTHER	ZCC-9903	833-534-0535
	664	OTHER		ZCC-9903	833-534-0535
	820,822			ZGC-9907	833-534-0535
	OTHER			SMS-9902	833-534-0535



### Label Definitions - LAD

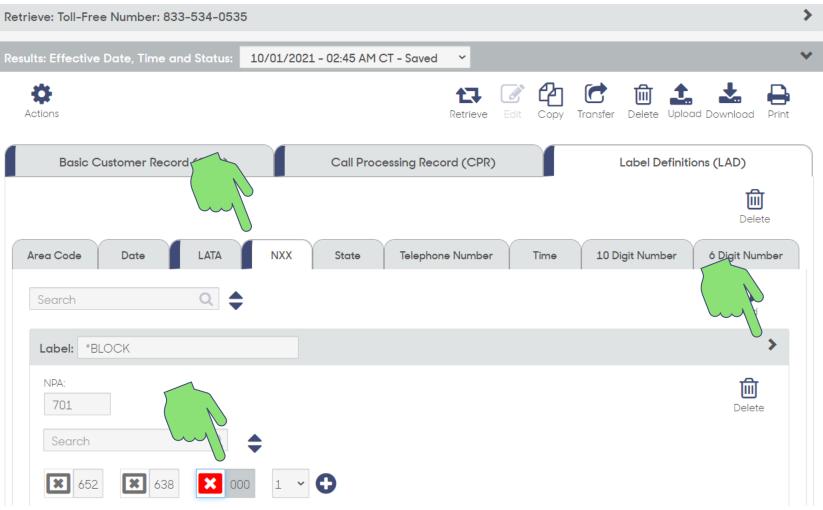
- User define labels for criteria values used on an associated CPR
- Navigate to the LAD tab, then LAD Type
- Find your Label, click to expand to view defined data

ults: Effective I	Date, Time a	nd Status: 09	9/14/2021 - 0	5:15 AM CT -	Pending 🗡				
Actions					Retrieve	Edit Copy	Transfer Delet		Download Print
Basic Cu	ustomer Reco	rd		Call Processi	ng Record (CPR)		Label	Definitio	ns (LAD)
		h							Delete
Area Code	Date	LATA	NXX	State	Telephone Number	Time	10 Digit N	umber	ó Digit Number
Search		Q 🌩							
Label: *IN>	XS								~
NPA:									
505									
Search		Q 🖨	:						
<b>X</b> 786	<b>X</b> 789	<b>X</b> 723	<b>X</b> 722	<b>X</b> 731	. 🔀 733	735	699	<b>X</b> 65	5
<b>X</b> 368	<b>X</b> 371							_	
					'I NI		<b>.</b>		
					he Navy			icate	es an
				e	ntry in t	he LAD	) type		



### Modify a Future Dated Record

- Navigate to the NXX tab
- Find the label, click to expand
- Single click on items to remove, they will turn RED





### **Template Record - TAD**

#### > Retrieve: Template Record: \*BR-LISARCLASS $\checkmark$ 05/13/2021 - 11:00 AM CT - Active ~ esults: Effective Date, Time and Status Ö **1** ሮዶገ Actions Retrieve Copy Upload Download Print Basic Template Record (TAD) Call Processing Record (CPR) Label Definitions (LAD) $\mathbf{v}$ Template Record Administrative Information \* Resp Org \* High Priority Disconnect BRSAC Last Changed Approval 05/13/2021 11:01 AM Not Required By Previous User BRSACLAK Template Information \* Template ID Template Description 191288

#### Template Record Administrative Information

- Effective Date\*
- Effective Time
- Resp Org\*

\*Required

### **TAD Contact information**

#### Template Record Administrative Information

#### Contact Information

- Contact Name
- Contact Number
- Notes

Contact Name	Contact Number			
Your Name here	844-437-7666	844-437-7666		
Notes				
Destination *				



#### **TAD - Destination & Area of Service**

<ul> <li>Destination *</li> </ul>	4.1
-----------------------------------	-----

• Areas of Service

Carriers \*

	Destination *	
	Number of Lines * 999	
*	Areas of Service *	~
	Networks	>
	States	>
	NPAs	>
	LATAs	>
	Labels	>
	Carriers *	~
	IntraLATA Carriers	>
	InterLATA Carriers	>



### Using the TAD with a PAD

- The PAD screen will enable Resp Orgs to create, view and update a Pointer Record that points to a Template Record for its routing data (CPR and LAD).
- Resp Orgs will be provided the capability to use any of their Active Templates for multiple Toll-Free Numbers.



### **Pointer Record - PAD**

	Retrieve: Toll-Free Number: 833-566-0411		>
	Results: Effective Date, Time and Status: 05/19/2021 - 11:45 AM CT -	Active Y	~
d Fields:	•	tə 🕜 🖆 💼 🚣 🔒	1
Effective Date *	Actions	Retrieve Edit Copy Transfer Delete Upload Download Print	
Effective Time	Pointer Record Administrative Information *		*
Resp Org	Resp Org * BRSAC	Customer ID High Priority	
Service Order or	Agent ID	Telco BRSA	
Supplemental Form	End Subscriber Name		
	End Subscriber Address		
	Service Order	Supplemental Form	
	M987456		
	Last Changed	Approval	
	05/19/2021 11:57 AM	Not Required	
OS"	Bv	Previous User	

**Required Fields:** 

•

#### Pointer Record – PAD Cont...

• Template Name\*: (Must be ACTIVE at the SCPs)

 Destination Number\*: Lists the TFN

Contact Name

Contact Number

• Notes

*BR-LISARCLASS				
Destination *				
Destination Number *	Number Of Lines *	LSO	FSO	
833-566-0411	500			
Contact Information				
Contact Name		Contact Number		
-SB-Reich, Lisa		844-439-7666		
-SB-Reich, Lisa				
-SB-REICH, LISA				



#### **Need More?**

Do you need access? This is completed by a Primary Contact, Company Admin, or a User Admin.

#### Resources

COMPANY ADMIN HOME SUBMIT REQUESTS RESP ORG TOOLS FIND DOCUMENTS RESOURCES MY INFO

#### Number Admin History Report System How-To Videos SMS/800 TFN Registry User Interface (UI) Industry Guidelines O How to Log into the SMS/800 TFN Registry UI O How to Reserve and Spare a Toll-Free Number Calendar O How to Build a Customer Record (CAD) System How-To O How to Build a Call Processing Record (CPR) O How to Build a Label Definition (LAD) **Check Point VPN** O How to Immediately Activate a Toll-Free Number **Frequently Asked Questions** O How to Build a Template Record (TAD) Introduction to Toll-Free O How to Build a Pointer Record (PAD) O How to Convert a Customer Record (CAD) to a Pointer Record (PAD) **Billing Information** O How to Change the Resp Org on an Active Toll-Free Number **Third Party Verification** O How to Disconnect an Active Toll-Free Number How to Re-Activate a Disconnected Customer Record (CAD) **Electronic Signature** Web Based Access (WBA) Interface **Enhancement Request**

#### Visit Resources on •

https://portal.somos.com/

System How-To

Videos

•



#### Already have Somos Portal Website access? How to setup your users for access?

- If you have a secure Portal logon you can view the video:
  - How to Manage Users

https://portal.somos.com/

https://portal.somos.com/Controls/VIDEO/videoPlayer.aspx?VideoID=1



### **Need More Information?**

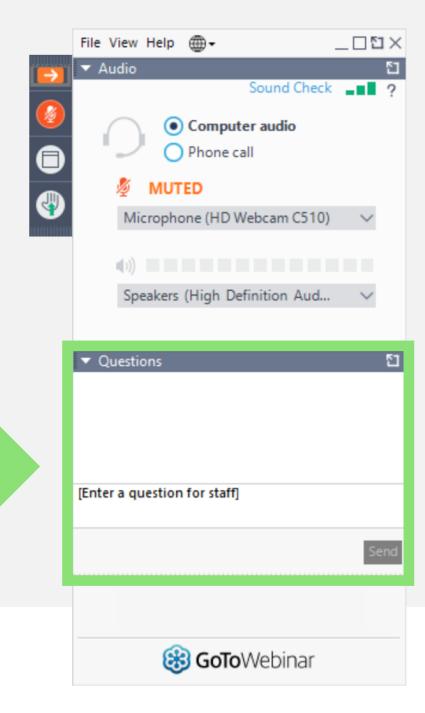
- Once you have watched today's webinar, signup for a Resp Org Focus Session
- If you need more than a Focus Session register for the June 14, 2021 class. Please sign up by May 28, 2021. This is the last scheduled class prior to the September 30, 2021 decommission for WBA and MGI.
- https://info.somos.com/SMS800ClassTrainingBrochure.html

🔨 SOMOS"

- The user experience is important, and we are constantly working to improve. The Calendar, located under Resources on <u>https://portal.somos.com</u>, will list SMS/800 TFNRegistry Updates, also watch for future communications to the industry.
- If you have questions, please feel free to Call/Email/Text the Help Desk
   Call or Text | 844.HEY.SOMOS or 844.439.7666, or Email | <u>help@somos.com</u>

#### **Questions?**

Submit your questions in the Questions box and our moderator will address your questions live.





### **UI Resp Org Focus Sessions**

## Would you benefit from dedicated time with TFN Registry experts?

- One-hour Zoom calls
- Attendees may be multiple Resp Orgs per session or one Resp Org with up to 10 participants
- Prerequisite: Attend or watch recording of the UI walkthrough Webinar
- Registration is free

- June 30 @ 2PM ET / 1PM CT
- July 14 @ 2PM ET / 1PM CT
- July 22 @ 10AM ET / 9AM CT

Email us at <u>tfnregistry@somos.com</u> if you are interested in learning more about how to sign up!



#### SMS/800 TFN Registry® API & UI



