



The 8MS User Guide

Issue 31.0



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Introduction

Welcome to 8MS, your Toll-Free Management System!

8MS is a feature rich, web-based platform designed to simplify and automate toll-free provisioning as well as reduce your carrier costs via Least Cost Routing optimization.

8MS Features

- Efficiently manage, search, and reserve thousands of toll-free numbers
- Create Number Lists, Routing Sets, and SMS Templates then automatically synchronize them with valid routing plans
- Complete mass changes and updates in a single action
- Quickly perform emergency re-routing of toll-free numbers in case of an outage
- Analyze and optimize toll-free number routing using a Graphical Editor
- Data mine historical archives for better Business Intelligence
- Create and automate complex routing and Least Cost Routing
- One step end-to-end activation of toll-free numbers

System Requirements

8MS officially supports any reasonably modern version of Chrome, Firefox, and Edge. Compatibility and functionality may vary when using other browsers.

We recommend your display be set to a minimum screen area (resolution) of 1024 x 768.



8MS uses popups for validation, status notification and other items.
Please disable your browser's pop-up blocking feature when accessing 8MS.

Customer Support

Please feel free to contact us with your questions and comments.

Send us an email: 8mscust@iconectiv.com.

-or-

Click the envelope icon on the upper right of any 8MS screen: 

-or-

Call us: 732-356-6999

Forgot your password?

You may reset your password from the **Login** screen. See the [Reset Password](#) section for details.

Need Training?

Free phone-based training is available and will be suited to your individual needs.

On-site training is also available. Fees may apply.

Please contact us for more information.

Overview of Toll-Free Services Management

SMS/800

SMS/800 is the system responsible for managing toll-free (800, 833, 844, 855, 866, 877, and 888) numbers recognized by the North American Numbering Plan (NANP). Its primary responsibility is to assign toll-free numbers and route the numbers to one or more carriers via Service Control Points (**SCPs**). SCPs store the necessary information to route a call to the appropriate carrier. This information is stored as a record. Records may be activated immediately or scheduled for a future date/time. When a record is ready to be activated, SMS/800 loads the record onto the SCPs.

Companies that interact with SMS/800 must assign a Responsible Organization or **Resp Org** to manage their toll-free numbers (e.g., reserve, spare, transfer, routing, etc.). Resp Orgs may interact with SMS/800 using one of three interfaces. The 3270 legacy interface and the web interface are known as user interfaces. The third interface is an application programmer interface (API) known as the Mechanized Generic Interface (MGI).

Introducing 8MS

8MS is an MGI client of SMS/800 that provides value-added features that make management of toll-free service easier, faster, and more accurate. *What used to take months now takes minutes.*

The first concept that makes 8MS so powerful is the use of **Number Lists**. SMS/800 limits users to performing actions (changing Resp Orgs, record activation, disconnecting and sparing a number, etc.) one number at a time. The 8MS Number List feature allows multiple updates to multiple numbers with a single action. Updating 10,000 numbers is as easy as updating a single number. Performing any action with a Number List is known as a **Batch**. A batch allows a Number List to be selected as the target of your action, allowing all numbers in that list to be manipulated. Many 8MS screens provide ways to dynamically create Number Lists. You may also import and export your Number Lists as a .csv (comma separated values) list. These files may be then be saved as a text file or imported into any application that understands csv files (such as Microsoft Excel and Access). All 8MS screens that allow manipulation of a single toll-free number also provide a batch capability.

8MS Routing Sets are another powerful, value-added feature in 8MS. 8MS will analyze the routing-affecting data (e.g., Inter-LATA and Intra-LATA Carriers, complex routing) in every record of every toll-free number in the 8MS database and create an 8MS Routing Set. You may then use the Routing Set as the source or target for record activation of one or more toll-free numbers. Routing Sets may also be given unique names to further help you manage and assign routing data. To print or share a 8MS Routing Set, you may generate a report that displays the CAD, LAD, and CPR (complex routing) in .pdf format.

8MS provides flexible search capabilities within your current set of toll-free numbers and their individual records. Besides being able to restrict searching to specific number lists or 8MS Routing Set, you may also look for numbers that route to particular areas of service or specific carriers. Number history and Resp Org ownership details, including changes, are available with the click of a button. Enhanced searching is available for spare numbers. You may search for currently available spare numbers or retrieve spare number forecasting data for numbers that will be available in the near future. Vanity number searches are also available without needing to indicate where particular words will appear in the toll-free number.

8MS is designed for efficiency. All user activity as well as batch status is tracked and logged. Critical recently used data such as toll-free numbers, number lists, and 8MS Routing Sets are easily accessible without having to retype the data. The Undo Record Activation screen allows you to re-activate your most recent old record and will also work with your Number Lists. 8MS will save you time and money as well as track and log all of your necessary data.

Carrier Express

One of the primary functions of SMS/800 is to load routing data onto SCPs on the telephony network. Once the routing data is loaded, the SCPs route calls to the specified carrier networks. Since SMS/800 only loads routing data to the SCP, the user (Resp Org) must next load their routing data onto a carrier network. If a Resp Org is limited to the SMS/800 system, they must load routing data at least twice: in SMS/800 and within each carrier network for routing setup to be complete.

8MS provides the ability to interface with Carrier Express. Carrier Express serves as a "one-stop shop" for users to load routing data onto SMS/800 and onto the selected carriers. Carrier Express interfaces directly with carriers to activate and disconnect toll-free numbers. Users will no longer need to enter data into multiple systems or have experience with individual carrier systems.

Local Data

While SMS/800 is the FCC designated database of record for toll-free service, 8MS makes it easier and faster to manage your data via the 8MS local database. 8MS maintains communication with SMS/800 and keeps a local copy of all data for numbers that you have managed via 8MS. The local database is kept up-to-date via an automated notification process between SMS/800 and 8MS. If a number in your Resp Org is changed via any SMS/800 interface (web, 3270 or MGI) an unsolicited message is sent from SMS/800 to 8MS, notifying 8MS that a number has changed. In response to this unsolicited message, 8MS retrieves that number from SMS/800. Unsolicited messages ensure that the 8MS local database is sync with SMS/800 and data is up-to-date. The 8MS local database also stores the information that is not available in SMS/800: your Number Lists and 8MS Routing Sets.

Service Levels

A service level is the level of service that you purchase from 8MS. Each service level allows you to store a set amount of toll-free numbers in the 8MS database as well as a set amount of local deletions that you can perform. The higher a service level you purchase, the more numbers you can store and the more local deletions you can perform. Since billing is normally performed on a monthly basis, you can change your service level prior to the start of a month. If you exceed the amount of numbers or the amount of local deletions within a single month, there is a additional cost that will be charged to your account.

Since there is a charge for exceeding your service level limits, 8MS allows you to track your transactions and your total amount of toll-free numbers within 8MS. You may customize alerts and notifications based on your

transaction limits based on company or user preferences. The alerts will be displayed in a pop-up window at login or after selecting an item from the menu. To manage your transactional limits, you may, at any point, delete numbers from 8MS. This will not remove numbers from the SMS/800 database, only from 8MS. These numbers may always be retrieved again at a later date. You may also, at any point, retrieve additional numbers from the SMS/800 system into 8MS. Transactional limits, alerts, and Number Lists will help you to delete and retrieve these numbers efficiently and accurately.

Platforms

8MS customers range from small companies that manage less than 500 toll-free numbers up to large carriers that manage millions. Based on several factors, some 8MS customers choose to have their own platform, while others take advantage of shared platforms.

A **Shared Platform** is an 8MS server that has multiple customers sharing a network connection to SMS/800. This means that a customer's messages to SMS/800 get queued behind other customers' messages on a first-in/first-out basis. If you pay for 8MS service based on either service level (including Semi-Private) or the number of transactions per month than you are assigned to the Shared Platform. Shared Platforms are commonly referred to as the **Service Bureau**. All Service Bureau platforms run out of 8MS Data Centers managed by the 8MS Support Team.

A **Private Platform** is also an 8MS server with a network connection to SMS/800 that is dedicated to a single customer and are run out of 8MS Data Centers managed by the 8MS Support Team

A **Dedicated Platform** is an 8MS server with a network connection to SMS/800 that is dedicated to a single customer but are run out of the customer's data center and managed by the customer's support team.



As noted above, all 8MS screens provide an easy-access button for sending email to the 8MS Support Team. **Private** and **Dedicated** Platforms may modify the destination email address or remove the email button entirely. Refer to **Customizing 8MS** for how to set **Company Preferences** and see **EmailSupport** under **User Interface Preferences** for details on customizing this button.

Complex Record Generation and Least Cost Routing

8MS has developed a complex record generation (CPR) add-on tool that allows you to easily define your LATA, NPA, NXX, and State routing to carriers in a simple text file. Records that require routing to multiple areas of service can quickly become difficult to maintain. In an effort to reduce carrier costs, the CPR tool will perform an analysis of your carrier routing that may be automatically activated to begin reducing costs as soon as possible.

API

In addition to the 8MS Web User Interface, 8MS also provides an Application Programmer Interface (API) that allows you to integrate 8MS with your own internal toll-free provisioning applications. The 8MS API is a web-based interface that allows you to use any programming language that allows generation of HTTP (web) requests. Responses are simple XML formatted documents. The 8MS API includes calls to interface with **SMS/800** and **Carrier Express**. [Click here for more information.](#)

Documentation

In the upper right of all 8MS screens is a small button with a question mark on it:  Clicking this button opens the **8MS User Guide** section related to the screen you are currently viewing. Clicking on the **Main Help Page** link, in the upper right of the page you are viewing returns you to the beginning of the User Guide. The question mark button is also accessible from the lower left of the menu. Clicking on the question mark in the menu will bring you to the beginning of the User Guide.

From the Tools menu on the left is a *Documentation* link to all online documentation. This includes links to online and .pdf versions of the **User Guide**, **API Guide**, and **FAQ** (Frequently Asked Questions). The FAQ is based on user questions that have been collected over the last five years. Please review the FAQ if you experience any issues in 8MS.

In addition to the FAQ, new tutorials are added to the documentation as the need arises. All current tutorials may be found in the **FAQ and Tutorials** section.

Customer Notifications/Alerts

Software upgrades are performed several times a year, providing performance improvements, new features, and enhancements to existing screens. To ensure the best possible reliability and support, all 8MS web servers are maintained in multiple data centers and site switches are performed on a regular basis. Any SMS/800 scheduled downtimes or performance problems will be posted.

To keep you informed of events, 8MS displays notifications and alerts in 3 locations within the user interface:

- **Login** screen - any information you should be aware of before logging in will be posted in the lower portion of this screen.
- **Welcome** screen - review the center of the Welcome screen each time you log in. To view more information related to this screen, see the **Welcome Page** section of the User Guide.
- **Notification** Notifications were introduced in 8MS 15.0. They provide a flexible way for users to choose what types of notifications they receive and how they receive them. Users may choose to view notifications when they log in, via email or via text. By default, all users are registered to receive urgent problems, scheduled downtimes, site switches, and general bulletins. To learn how to register or unregister for notifications, see the **Registration Management** section of the User Guide. To learn how to view on-line notifications, see the **Notification Alerts** section of the User Guide.

This section of the user guide provides a history of changes made to 8MS by release.

Release 31.0

8MS 31.0

This release includes security enhancements and bug fixes.

Release 30.0

8MS 30.0

This release includes security enhancements, web server upgrades and bug fixes.

[Record Management: AT&T](#)

Add size limit to the following fields:

- **Contact Name:** Maximum size is 30 characters.
- **Client Order #:** Maximum size is 21 characters.

[Disconnect: AT&T](#)

Add size limit to the following fields:

- **Contact Name:** Maximum size is 30 characters.
- **Client Order #:** Maximum size is 21 characters.

[API Changes](#)

Add AT&T field size limits to the following API calls:

- **CarrierExpressActivate**
- **CarrierExpressChange**
- **CarrierExpressDisconnect**
- **BatchCarrierExpressActivate**
- **BatchCarrierExpressChange**
- **BatchCarrierExpressDisconnect**

AT&T field size limits:

- **contactname:** Maximum size is 30 characters.
- **clientorderno:** Maximum size is 21 characters.

Release 29.0

8MS 29.0

This release adds Sinch as a new carrier under Carrier Express. Numbers may now be activated on the Sinch network.

This release also adds a new API call for retrieving historical records for a specific carrier sent to Carrier Express.

Record Management

A Sinch tab has been added. Users may activate, or change numbers at the Sinch network.

Disconnect

A Sinch tab has been added. Users may disconnect numbers at the Sinch network.

Search Local Carrier Express

A Sinch tab has been added. Users may view old records sent from 8MS to Sinch.

API Changes

For interacting with Carrier Express, six API calls have been modified.

- **CarrierExpressActivate** now allows a single number to be activated at the Sinch network.
- **CarrierExpressChange** now allows a single number to be modified at the Sinch network.
- **CarrierExpressDisconnect** now allows a single number to be disconnected at the Sinch network.
- **BatchCarrierExpressActivate** now allows a list of numbers to be activated at the Sinch network.
- **BatchCarrierExpressChange** now allows a list of numbers to be modified at the Sinch network.
- **BatchCarrierExpressDisconnect** now allows a list of numbers to be disconnected at the Sinch network.

For retrieving historical records sent to Carrier Express, a new API call has been added.

- **SearchLocalCarrierExpress** allows a single number to be queried for data associated with one carrier.

Release 28.0

8MS 28.0

This release includes security enhancements, web server upgrades and bug fixes. Changes that impact the user focus on EditPlan.

EditPlan

A node/branch quick reference help dialog has been added to the Help menu.

The open dialogs under *File/Open/Open Dialed Number Plan* and *File/Open/Open SMS Template Plan* and the import/exports dialogs under *View Copy Buffer* have been fixed.

A confirmation dialog has been added prior to opening a new plan, preventing the possible loss of changes to a CPR.

Validation for Date and Time nodes have been enhanced.

Validation for label names have been fixed.

Release 27.0

8MS 27.0

This release updates the Carrier Express interface to AT&T.

Record Management: AT&T

For Carrier Express, the *Record Management: AT&T* tab has been modified to match data in the new AT&T interface.

Disconnect: AT&T

For Carrier Express, the *Disconnect: AT&T* tab has been modified to match data in the new AT&T interface.

Search Local Carrier Express

For Carrier Express, the *Search Local Carrier Express: AT&T* tab has been modified to match data in the new AT&T interface.

Upload Blanket Authorization Form

A new screen has been added which allows customers to upload a form requesting "blanket authorization" to provision numbers on the AT&T network.

[API Changes](#)

For interacting with Carrier Express: AT&T three API calls have been modified.

- **CarrierExpressActivate** has had parameters changed to match the new AT&T API.
- **CarrierExpressChange** > has had parameters changed to match the new AT&T API.
- **CarrierExpressDisconnect**, has had parameters changed to match the new AT&T API.

Release 26.0

8MS 26.0

Release 26.0 of 8MS was an internal release that had no user impact. The release upgraded the operating system.

Release 25.0

8MS 25.0

This release introduces support for single sign-on. A company may now use iconectiv single sign-on features or may continue to use the legacy 8MS sign-on. Regardless of how a user logs onto 8MS, the screens continue to behave as they did previously.

This release also continues the long-term project of removing HTML frames from the user interface.

[Frame Removal](#)

The following screens have had changes to their appearance related to frame removal:

- Number Admin
 - Delete Local
- SMS Templates
 - Delete Local Template
- System Admin
 - Company
 - Users

[Activity Log](#)

Two new types have been added to the **Type** drop-down in support of single sign-on.

- *SSO Alias* identifies actions that take place in the new **Company: Configure** dialog.
- *SSO Users* identifies actions that take place in the new **Company: Manage Users** dialog.

Company

A new section has been added to this screen for management of single sign-on features. This section shows

- the number of *SSO Aliases* that have been created via the **Configure** dialog.
- a **Configure** button that brings up the **Configure** dialog. This dialog allows administrative users to create additional URLs used by a company to log onto 8MS via the single sign-on process.
- a **Manage Users** button that brings up the **Manage Users** dialog. This dialog allows administrative users to create single sign-on data for users defined in the **Users** screen.

Users

For managing new GUI users for a company that is using single sign-on, the **Update** and **Delete** buttons will create or delete data necessary for logging onto 8MS via the single sign-on process.

API users will not log in via the single sign-on process; they will continue to log in through their normal method.

Release 24.0

8MS 24.0

This release continues the long-term project of removing HTML frames from the user interface.

A new Company Preference was added to restrict CAD/PAD Batch Disconnects. This change allows a company to deny their users access to the 8MS Routing Set and SMS Template drop-down lists. This was added to reduce the chance that a user accidentally disconnects a large set of toll-free numbers by selecting an 8MS Routing Set or SMS Template with a large set of toll-free numbers associated with it.

The GUI now shows pending Somos downtimes, both on the GUI menu and on the Welcome page.

Frame Removal

The following screens have had frames removed:

- Number Admin
 - Search/Reserve

System Activity

- Activity Log
- Usage Counts
- CPR Generator
 - CPR Gen
 - LCR Gen

TOC/Menu

The GUI now alerts users of pending Somos downtimes. From the GUI menu, if there is a pending Somos downtime, the word *DOWNTIME*, shown in red, appears below the company and user names (above the Number Admin category).

Record Management: CAD

A new Company preference -- *DiscBatchHasRsSt* -- allows a company to deny their users access to the 8MS Routing Set and SMS Template drop-down lists. This is done by setting the value of the preference to 0.

For this screen, the drop-down lists will only be hidden if the *End Intercept Date* has been set, since this sends a disconnect request to Somos.

Record Management: PAD

A new Company preference -- *DiscBatchHasRsSt* -- allows a company to deny their users access to the 8MS Routing Set and SMS Template drop-down lists. This is done by setting the value of the preference to 0.

For this screen, the drop-down lists will only be hidden if the *End Intercept Date* has been set, since this sends a disconnect request to Somos.

Disconnect: SMS/800

A new Company preference -- *DiscBatchHasRsSt* -- allows a company to deny their users access to the 8MS Routing Set and SMS Template drop-down lists. This is done by setting the value of the preference to 0.

Release 23.0

8MS 23.0

This release continues the long-term project of removing HTML frames from the user interface.

8MS TeXT has been removed from Record Mgmt, Disconnect and the Carrier Express screens.

Shortcuts have been added to Routing Set Info and Template Info.

Template Info allows filtering out the "BR" Templates.

Frame Removal

The following screens have had frames removed:

- Number Admin
 - ROC Mgmt
- System Activity
 - Batch Log
- System Admin
 - API Types
 - User Types

Record Management: 8MS TeXT

The 8MS TeXT tab has been removed.

Disconnect: 8MS TeXT

The 8MS TeXT tab has been removed.

Template Info

Shortcuts have been added.

The ability to filter out "BR" Templates has been added. "BR" Templates are Templates gained when a toll-free number on a Template is turned over to your Resp Org.

8MS TeXT

All screens under the 8MS TeXT menu have been removed.

Routing Set Info

Shortcuts have been added.

Release 22.0

8MS 22.0

This release continues the long-term project of removing HTML frames from the user interface.

Global Crossing has been removed from the Carrier Express screens.

A delete button has been added to the Template Info screen.

The ROC Participant field has been removed from SMS Contacts.

Frame Removal

The following screens have had frames removed:

- Number Admin
 - Spare # Forecast
- Notification Management
 - Notification Alerts
 - Event Log
- Tools
 - CarExp Msg Status
 - API Msg Status
 - SMS Msg Status

Record Management: Global Crossing

The Global Crossing tab has been removed from the Record Management screen.

Search Local Carrier Express

The Global Crossing tab has been removed from the Search Local Carrier Express screen.

Template Info

A delete button has been added to this screen, allowing users to delete unused SMS Templates.

SMS Contacts

With the confirmation by Somos that all customers now participate in ROC management, the ROC Participant field has been removed from the middle (list) area of the SMS Contacts screen.

Documentation

The ROC Access Forms section has been removed from the 8MS Documentation screen.

Release 21.0

8MS 21.0

This release continues the long-term project of removing HTML frames from the user interface.

Frame Removal

The following screens have had frames removed:

- Number Admin
 - Search Local Number
 - Search Local Record
- SMS Templates
 - Search Local Template
- System Activity
 - SMS/800 Contacts
- Top Level Screens
 - Login

Release 20.0

8MS 20.0

This release continues the long-term project of removing HTML frames from the user interface.

Frame Removal

The following screens have had frames removed:

- Number Admin
 - Number History
- SMS Templates
 - Template History
 - Template Info
- 8MS Routing Sets
 - Routing Set Info
 - Routing Set Mgmt
- Tools
 - Connections

Release 19.0

8MS 19.0

Release 19.0 of 8MS makes enhancements to several screens. It also contains several internal changes.

This release also begins a long-term project of removing HTML frames from the user interface.

This will allow for a more flexible user interface design once frame removal has been completed.

Frame Removal

The following screens have had frames removed:

- Number Admin
 - CPR Management
 - Undo Record Change
- SMS Templates
 - Template CPR Management
- System Activity
 - Reports
- System Admin
 - Params
- Tools
 - Geographic Info
 - GUI Usage
 - Process Control
 - Web Log

Delete Local Template

Users may now delete an SMS Template that has Toll-Free Numbers associated with it.

A Date/Time field has been added, allowing a specific SMS Template record to be deleted.

Activity Log

The SMS Template search field has been changed from a standard drop-down list to a drop-down list/text field combo box, with auto-match typing on the name, allowing users to enter any SMS Template name.

Prior to this release, users looking for ROC activity were forced to search through the 9 individual ROC types. A *ROC All* type has been added to the *Types* drop-down, allowing users to view all ROC activity with a single search.

The MGI status dots on the upper left have been removed since the Somos MGI was replaced with the TFN Registry API.

Company

A generic *Notes* field has been added.

Release 18.0

8MS 18.0

Carrier Express: Lumen-5102

The Lumen-5102 (formerly CenturyLink-5102) interface to Carrier Express has been updated for a new API provided by Lumen. Several API calls and screens were updated to reflect the changes.

Record Management: Lumen-5102

For Carrier Express, the *Disconnect: Lumen-5102* tab has been modified to match data in the new Lumen API.

Disconnect

For Carrier Express, the *Disconnect: Lumen-5102* tab has been modified to match data in the new Lumen API.

Search Local Carrier Express

The Lumen-5102 section has been modified to support new data available from the new Lumen API.

API Changes

For interacting with Carrier Express: Lumen-5102 two API calls have been modified.

- **CarrierExpressActivate**, has had parameters changed to match the new Lumen API.
- **CarrierExpressDisconnect**, has had parameters changed to match the new Lumen API.

Release 17.6

8MS 17.6

TFN Registry

This release completes the porting of MGI to the SMS/800 TFN Registry API. The remaining API calls that were ported in this release are the SCP and Resp Org change calls.

SCP Query Popup

The Somos MGI interface allowed individual SCPs to be queried, but with the Somos Registry API, it is not possible to specify individual SCPs. Now that the 8MS SCP API calls have been ported, you may no longer query individual SCPs. Instead, all SCPs will be queried

API Changes

The following API calls have been ported to use the Somos Registry API:

- **MultiChangeResporg**
- **BatchMultiChangeResporg**
- **ScpQuery**
- **ScpResend**
- **BatchScpQuery**
- **BatchScpResend**
- **SmsTemplateScpQuery**
- **SmsTemplateScpResend**

Release 17.5

8MS 17.5

TFN Registry

Continuing the porting of MGI to the SMS/800 TFN Registry API, all SMS Template record management API calls have been ported, along with the CPRGen API call. All are now capable of using either MGI or Registry API calls.

TFN Registry Link Status

The Activity Log screen provides a quick snapshot of link status that includes Carrier Express and SMS/800 MGI. In this release, we've added status for the Somos TFN Registry API.

Activity Log

On the upper left of the Activity Log screen, link status is shown via small colored dots. This status now adds TFN Registry API link status to the previously shown Carrier Express and SMS/800 MGI link status.

Documentation

The 8MS Login Administration form, accessible from the Documentation menu item, is now editable from within Adobe Acrobat Reader.

API Changes

The following API calls have been ported to use the Somos Registry API:

- **SmsTemplateChange**
- **SmsTemplateCopy**
- **SmsTemplateDelete**
- **SmsTemplateDisconnect**

SmsTemplateTransfer

- CPRGen

Release 17.4

8MS 17.4

TFN Registry

Continuing the porting of MGI to the SMS/800 TFN Registry API, the remaining TFN number management and record management API calls have been ported and are now capable of using either MGI or Registry API calls.

AT&T Carrier Express

Basic IP service in the Carrier Express: AT&T interface has been enhanced. Previously, only one routing number could be assigned to a set of toll-free numbers in a batch. The batch calls now support a one-to-one relationship between each toll-free number and routing number. This impacts the 8MS Carrier Express API calls and the 8MS Carrier Express toll-free provisioning screens.

Record Management: AT&T

To support the new one-to-one relationship between toll-free number and routing number, a new *Send File* button has been added next to the *Send Batch* button. Clicking this new button will bring up a modified batch popup that allows mapping individual toll-free numbers to their specific routing number.

API Changes

The following API calls have been ported to use the Somos Registry API:

- **NumberChange**
- **BatchNumberChange**
- **CopyRecord**
- **BatchCopyRecord**
- **ReserveActivate**
- **ReferralQuery**
- **BatchReferralQuery**

For interacting with Carrier Express: AT&T, two API calls have been modified.

- **CarrierExpressActivate**, for the AT&T carrier, now allows a one-to-one relationship between toll-free numbers and routing numbers for batch calls using *Basic IP* service.
- **CarrierExpressChange**, for the AT&T carrier, now allows a one-to-one relationship

between toll-free numbers and routing numbers for batch calls using *Basic IP* service.

Release 17.3

8MS 17.3

TFN Registry

Continuing the porting of MGI to the SMS/800 TFN Registry API, the TFN record management API calls and search/reserve API calls have been ported and are now capable of using either MGI or Registry API calls.

API Changes

The following API calls have been ported to use the Somos Registry API:

- **Disconnect**
- **NumberSpare**
- **RecordDelete**
- **RecordTransfer**
- **Reserve**
- **Reserve8fa**
- **ReserveSP**
- **Search**
- **Search8fa**
- **SearchSP**
- **BatchDisconnect**
- **BatchNumberSpare**
- **BatchNumberSpare**
- **BatchRecordDelete**
- **BatchRecordTransfer**
- **BatchReserve**
- **BatchSearch**

Release 17.2

8MS 17.2

TFN Registry

Continuing the porting of MGI to the SMS/800 TFN Registry API, we have ported the four Record Change API calls. These calls are now capable of using either MGI or Registry API calls.

ROC Management

The ROC Management screen now allows you to search by ROC TransactionID.

API Changes

The following API calls have been ported to use the Somos Registry API:

- **RecordChange**
- **PointerRecordChange**
- **BatchRecordChange**
- **BatchPointerRecordChange**

Release 17.1

8MS 17.1

TFN Registry

In mid-2019, Somos replaced the SMS/800 toll-free number management system with a completely rewritten system known as the SMS/800 TFN Registry. As part of the new system, a new TFN Registry API was introduced with the intention of eventually replacing the SMS/800 MGI API. In October of 2019, Somos announced that the MGI would be decommissioned in 2021. Until release 17.1, 8MS only used the MGI API for communicating with SMS/800. 8MS release 17.1 is the first pass of a multi-release transition from the MGI API to the Registry API. In this release, the Query/Retrieve functions in 8MS are now capable of using either the MGI or Registry API calls.

Activity Archive

In the Activity Log, 8MS has historically only stored a few months of data depending on the 8MS platform you accessed. Older activity was removed nightly to keep data storage and retrieval manageable. Release 17.1 introduces an additional Activity Log archive. Users now have the option of searching either the normal Activity Log data or the additional archive.

EditPlan 1.0 Support Dropped

In release 13.0 a new beta version of EditPlan, known as EditPlan 2.0, was introduced. EditPlan 2.0 is browser-native and has no dependencies on external plugins whereas EditPlan 1.0 required the Java applet plugin. In release 16.0, the final major features of EditPlan 1.0 were added to EditPlan 2.0. In release 17.1, we are dropping support for EditPlan 1.0; the Java applet version will no longer be available.

Record Management: SMS CAD

The EditPlan *Non-Java Version* checkbox has been removed and only EditPlan 2.0 (the non-Java version) is now available.

CPR Management

The EditPlan *Non-Java Version* checkbox has been removed and only EditPlan 2.0 (the non-Java version) is now available.

SMS Template Management

The EditPlan *Non-Java Version* checkbox has been removed and only EditPlan 2.0 (the non-Java version) is now available.

SMS Template CPR Management

The EditPlan *Non-Java Version* checkbox has been removed and only EditPlan 2.0 (the non-Java version) is now available.

Activity Log

As discussed above, 8MS now provides an additional archive of activity. An additional 180 (system tunable) days of user activity is stored. A new *Archived* checkbox has been added. Users have the option of searching/viewing the standard activity or, by checking the checkbox, searching/viewing the archived activity. For performance reasons, users cannot search/view both sets of activity data at the same time.

CPR Generator

The EditPlan *Non-Java Version* checkbox has been removed and only EditPlan 2.0 (the non-Java version) is now available.

TFNR User Administration

A new screen has been added that provides the ability to set the Somos Registry (TFNR) API login ID and password for a Company.

API Message Status

An *Unsolicited* checkbox has been added to this screen to provide additional filtering when viewing API messages.

SMS Message Status

Two new columns: *CProc* (communications process) and *RspFmt* (response format) have replaced the *Channel* and *Priority* columns.

TFNR Link Status

A new screen has been added to view the status of TFNR API connections to the SMS/800 Registry.

API Changes

The following API calls have been ported to use the Somos Registry API:

- **NumberQuery**
- **NumberQueryAll**
- **NumberRetrieve**
- **NumberRetrieveAll**
- **RecordQuery**
- **SmsTemplateQuery**
- **RecordRetrieve**
- **SmsTemplateRetrieve**
- **SmsTemplateRetrieveAll**
- **SmsTemplateList**
- **BatchNumberQuery**
- **BatchNumberQueryAll**
- **BatchNumberRetrieve**
- **BatchNumberRetrieveAll**
- **BatchRecordQuery**
- **BatchRecordRetrieve**

Release 17.0 - AT&T Point Release

8MS 17.0 - AT&T Point Release

Release 17.0 is a point release that adds *Basic IP* service to the Carrier Express: AT&T interface. This impacts the 8MS Carrier Express API calls and the 8MS Carrier Express toll-free provisioning screens.

Record Management

For Carrier Express, the *Record Management: AT&T* screen now supports Basic IP service.

Disconnect

For Carrier Express, the *Disconnect: AT&T* screen now supports Basic IP service.

API Changes

For interacting with Carrier Express: AT&T, three API calls have been modified.

- **CarrierExpressActivate**, for the AT&T carrier, now supports Basic IP service.

- **CarrierExpressChange**, for the AT&T carrier, now supports Basic IP service.
- **CarrierExpressDisconnect**, for the AT&T carrier, now supports Basic IP service.

Release 17.0

8MS 17.0

Release 17.0 of 8MS introduces EDR -- Enterprise Disaster Recovery-- allowing enterprise customers to manage their own toll-free numbers and routing. For support of this feature, the ROC and SMS Template screens have had restrictions added specifically for EDR customers.

In addition to EDR, several screens have had minor modifications made to them. These are described below.

Disconnect

Rather than directly entering an *End Intercept Date*, users may now specify how many days in the future to set the end intercept date.

ROC Requests

For managing ROC requests and administration of the Somos ROC API login and password, the following changes have been made to support EDR customers:

- Access to ROC requests is restricted at the Resp Org level, rather than the Entity level.
- When submitting ROC requests to Somos, EDR companies may default to the parent company's ROC login/password or they may define their own.

SMS Templates

For managing SMS Templates the following changes have been made to support EDR customers:

- Access to SMS Templates is restricted at the Resp Org level, rather than the Entity level.
- The name for newly created SMS Templates will be preceded with the Resp Org rather than just the Entity. Thus, for an SMS Template that would have been named *AR-ATT-VZ, an EDR company would name it *ART01-ATT-VZ.

There are two exceptions to this rule:

1. SMS Templates created by the parent company are free to create names in the traditional (non-EDR) style.
2. "BR" Templates (SMS Templates gained via a Resp Org change, with or without an associated ROC request) will continue to have a prefix of the Entity followed by the string "BR" (e.g. *ARBR-ATT-VZ). These Templates are automatically created by Somos when a Resp Org change occurs on a toll-free number routing on a Template.

As such, Somos determines the Template name.

Search Local Template

The *Hold* checkbox was removed since it's not relevant to SMS Templates.

Text Management

The ability to rename a Connection was added.

Release 16.0

8MS 16.0

Release 16.0 of 8MS adds three new Text screens in support of Long Codes, MDRs and MMS, provides enhancements to the ROC Management screen and adds the final major features in EditPlan 2.0.

The new Text features include:

- Record Management: TeXT now allows MMS for all Delivery Types
- Order Long Codes - find Long Codes to Text activate
- View Text Message Status (MDRs)
- Text Management - streamlines Text provisioning

The ROC enhancements include:

- ROC request check-out/check-in, making it easier to coordinate ROC request management between multiple users
- Removing ROC requests from the filtered list as the requests are completed, making it easier to know what requests are still unprocessed

EditPlan 2.0, the browser-native (non Java-based) version of EditPlan adds the remaining major features necessary for it to replace the Java-based version. It also adds two new features to make editing faster and easier. Final features in this release include:

- AutoBuild
- Cleanup Labels and Cleanup Label Values
- Cut/Copy/Paste/Paste Labels
- Copy Buffer Viewer and Import/Export
- Find and Set All
- Splice Node

Record Management: 8MS TeXT

Prior to this release, MMS was only available for Conversations. It is now available for all Delivery Types.

ROC Management

A check-out/check-in feature is now available, making it easier to coordinate ROC request management between multiple users. Users may check out a ROC request to indicate that request is being processed. When searching for requests, users may filter for requests that are not checked out, allowing them to view only requests that are not currently being handled.

After providing a set of filters and retrieving a set of requests (shown in the middle frame), a user then selects a request to process. When all numbers have been submitted back to Somos (whether approved or rejected), the request is removed from the middle frame, allowing the user to know when all requests have been processed.

EditPlan 2.0

EditPlan 2.0, the browser-native (non Java-based) version of EditPlan adds the remaining major features necessary for it to replace the Java-based version.

- AutoBuild is now available.
- Cleanup Labels and Cleanup Label Values are now available.
- Cut/Copy/Paste and Paste Labels are now available.
- In conjunction with Cut/Copy/Paste, two new features have been added. The copy buffer may now be viewed in graphical format in a dialog window. Within that window, the copy buffer may be saved as a local plan, and a local plan may be opened and imported into the copy buffer.
- Find and Set All are now available.
- A new edit tool -- Splice Node -- has been added. Splicing a node means the node is deleted but its children are not. Instead, the spliced node's parent "adopts" that node's children.

Search Local TeXT

A Ported status has been added, allowing users to know when a number has actually been ported.

Order Long Codes

Users will now be able to search for available Long Codes create a Number List of desired Long Codes, and then activate those Long Codes for texting via the Record Management: 8MS TeXT screen.

Text Message Status

Users will now be able to view the status of text messages sent: date/time created, date/time process, delivery status and other similar data.

Text Management

The process of configuring numbers for texting has been streamlined. Rather than provisioning data in three separate screens: Text API, Text Firewall and Text Endpoint, users will now access a single screen to provision this data.

API Changes

For interacting with Aerialink for Texting services, three API calls have been added.

- **TextLongCodeQuery** provides the ability to search for available Long Codes.
- **TextMessagesQuery** provides the ability to query high-level data on text messages.
- **TextTransactionQuery** provides the ability to query transaction detail data on text messages.

Release 15.2

8MS 15.2

Release 15.2 of 8MS adds CenturyLink-5102 as a new carrier under Carrier Express. Numbers may now be activated on the CenturyLink 5102 network.

EditPlan 2.0, the browser-native (non Java-based) version of EditPlan now provides Label Editors, allowing full editing of routing plans.

Record Management

A CenturyLink-5102 tab has been added. Users may activate, modify or move numbers at the CenturyLink 5102 network.

Disconnect

A CenturyLink-5102 tab has been added. Users may disconnect numbers at the CenturyLink 5102 network.

Search Local Carrier Express

A CenturyLink-5102 tab has been added. Users may view old records sent from 8MS to CenturyLink 5102.

EditPlan 2.0

The Label Editor dialogs are now available. While features such as autobuild, cut, copy, paste and label cleanup are not yet available, users may now fully edit routing plans.

[API Changes](#)

For interacting with Carrier Express, four API calls have been modified.

- **CarrierExpressActivate** now allows a single number to be activated at the CenturyLink 5102 network.
- **CarrierExpressDisconnect** now allows a single number to be disconnected at the CenturyLink 5102 network.
- **BatchCarrierExpressActivate** now allows a list of numbers to be activated at the CenturyLink 5102 network.
- **BatchCarrierExpressDisconnect** now allows a list of numbers to be disconnected at the CenturyLink 5102 network.

Release 15.1

8MS 15.1

Release 15.1 of 8MS includes enhancements to the Somos ROC system.

[ROC Submit Request](#)

A new button has been added to provide the ability to create a Standard LOA Cover document to attach to a ROC Submit Request.

[ROC Management](#)

Provide the ability to search for ROC requests by specific Reason.

Allow users to specify Notes along with the multiple reasons for Declining a ROC request.

Release 15.0

8MS 15.0

Release 15.0 of 8MS introduces the Notification feature. This feature gives users the ability to register for notification of particular events via email, text or at login to the 8MS user interface. Notifications of the same type may be send singly, or bundled by day or week. Notifications are only sent if a user explicitly requests to receive that type of notification. For this release, notifications are available for Resp Org change, User/User Type changes and 4 types of bulletins: general, scheduled down time, schedule site switch, and urgent.

The beta, browser-native (non Java-based) version of EditPlan introduced in release 13.0 now supports editing and validating nodes and branches, allowing users to modify routing plans.

For better support of 8MS TeXT/Aerialink numbers, a new Search Local Text screen has been added, allowing users to view their 8MS TeXT records for both Toll-Free Numbers and Long Codes. In addition, Number Lists now allow Long Codes as well as Toll-Free Numbers.

The Switch Company feature is now session-based, so users do not need to perform a switch back to their original company before logging out.

Login

The password field has been increased to 32 characters.

Reset Password

The password field has been increased to 32 characters.

ROC Submit Request

The Somos ROC system provided a misleading message when validating file names for LOA and other files. To work around this problem, all file names are now validated locally.

ROC Management

The Somos ROC system provided a misleading message when validating file names for LOA and other files. To work around this problem, all file names are now validated locally.

EditPlan 2.0

In release 13.0 a new beta version of EditPlan, now know as EditPlan 2.0, was introduced. EditPlan 2.0 is browser-native and does not require the Java plugin. In that release, the editor was read-only and changes could not be made to routing plans. This release provides support for editing and validating nodes and branches.

Switch Company

8MS TeXT supports resellers and provides the concept of sub-companies under a reseller. To support this, a parent company needs to be able to switch to any of it's sub-companies to allow the parent company to manage the sub-company's data.

In the 14.0 release, the Switch Company screen remembered the switched company between login sessions, so a user could switch to a different company, log out and then log back in as that same company. This behavior has been changed so it is now session-based. When a user logs out, the switched company is forgotten. When the user logs back in, they are set back to their original company.

Change Password

The password field has been increased to 32 characters.

Unread Notifications Toolbar Icon

A new icon has been added to the toolbar that indicates the number of unread Login notifications. Clicking on this icon jumps the user to the **Notification Alerts** screen to view these unread notifications.

Notification Alerts

A new screen has been added that allows users to view all notifications that have been sent to them.

Notification Registration

A new screen has been added that allows users to register to receive notifications. Users may chose the specific notification types (Resp Org change, User change, general bulletin, down time bulletin, site switch bulletin, and urgent bulletin), how to receive their notifications (email, text or on login) and how to bundle the notifications (single, daily or weekly).

Event Log

A new screen has been added that allows users to view events that could result in notifications being delivered. In addition to viewing events, authorized users may also create some events such as bulletins.

API Changes

The Somos ROC system provided a misleading message when validating file names for LOA and other files. To work around this problem, all file names are now validated locally. This change impacts the ROCNumberRequest and ROCUploadDocument API requests.

Release 14.0

Aerialink

As **previously announced** on the **CSF web site**, in March, 2017 CSF purchased Aerialink, a company that provides comprehensive texting capabilities for toll-free numbers and long codes (referred to as *numbers* for the remainder of this discussion). In the context of 8MS, Aerialink provides the ability to route texts to one of several different delivery mechanisms.

Conversations

Conversations is a web-based user interface that allows users to view text messages sent to their numbers and reply back to the originating cell phone users.

API Client

An **API Client** allows a company to host a web server that receives text messages addressed to their numbers and to reply back to those messages. This API enables a company to fully integrate texting with the company's core business.

Email

The **Email** feature allows users to forward all received message on to an email address.

Text Forwarding

The **Text Forwarding** feature allows **Conversations** users to have texts forwarded to their mobile device when the are not logged on to **Conversations**.

Auto Response

The **Auto Response** feature allows **Conversations** users to define responses back to mobile-device customers. There are two forms of Auto Response:

- Pattern-based Auto Responses allow a company to define a set of patterns and responses. A pattern can be a single word or a combination of words. When a text message is received, each pattern is matched against the text message. If a pattern matches, the associated response is returned back to the originating cell phone user. A default response may also be defined; if no pattern matches, then the default response is returned.
- Time-based Auto Responses allow a company to define a response based on the day and time when a text arrives.

8MS 14.0

Release 14.0 of 8MS contains new provisioning and management screens for interfacing with Aerialink, allowing numbers to be activated and routed for texting. As always with 8MS, new API calls are also available, allowing companies to automate their number provisioning and management process.

In addition to enhancements related to texting, user interface styles, colors and fonts have been updated to provide a more modern appearance. Finally, several ROC enhancements have been added at the request of our users.

Overall User Interface

The user interface has been overhauled to provide a more modern appearance. Fonts have been changed, colors (while still customizable via User Preferences) are standardized colors adopted by CSF, borders on boxes have been removed and sharp edges have been softened to curves, giving a more pleasing overall appearance.

Record Management

The *8MS TeXT* tab allows users to activate numbers for texting at Aerialink. It also allows users to modify how messages are being delivered for one or more numbers. All functionality from the previous 8MS TeXT system has been removed.

ROC Submit Request

Many users were confused by the *Future Request Date* field. A notice now appears when a user enters a future date, explaining what the future date is meant for, and gives users the option to

clear this field prior to sending the ROC request.

ROC Management

The ability to create a CSV (comma-separated values) list of ROC requests has been added. This feature works in a manner similar to the **Search Local Number** and **Search Local Record** screens.

Credentials

A Credential is a form of key/secret pair used to verify that this Company is authorized to connect to Aerialink.

The **Credentials** screen allows a user to request Aerialink to grant that user's Company a Credential so they may connect to Aerialink. Credentials may be created, modified and deleted.

Endpoints

An Endpoint defines a URL, with an optional username and password, to which Aerialink may deliver messages.

The **Endpoint** screen allows a user to define a URL Endpoint which Aerialink will use to send message to the user's Company. Endpoints may be created, modified and deleted.

Firewalls

A Firewall defines an IP Address and Subnet, which Aerialink will add to their firewalls, to allow messages to be sent in to Aerialink.

The **Firewall** screen allows a user to request Aerialink to add an IP Address and Subnet to Aerialink firewalls to allow so they may send messages in to Aerialink. Firewalls may be created, modified and deleted.

TeXT API

An API is a name which is associated with one or more HTTP Endpoints or a single SMPP Credential, for delivery of messages from Aerialink to a Company.

The **TeXT API** screen allows a user to define APIs for message delivery. TeXT APIs may be created, modified and deleted.

Conversations Agent

A Conversations Agent is a user of the Conversations web-based user interface.

The **Conversations Agent** screen allows Conversations users to be created or modified.

Conversations Group

A Conversations Group is a group defined in the Conversations web-based user interface. Agents may be added to one or more Groups. Numbers are then assigned to a Group, granting Agents in that Group to have access to texts sent that a particular Number.

The **Conversations Group** screen allows Conversations Groups to be created, modified or deleted.

TeXT Company

A TeXT Company is an 8MS Company that has been provisioned in Aerialink, allowing them to provision text routing data on Aerialink. A TeXT Company may create and manage Sub-Companies but may not manage their own Company.

The **TeXT Company** screen allows a Company to create and manage Sub-Companies.

TeXT Users

TeXT Users are 8MS users that are granted permission to create and manage Aerialink data.

The **TeXT Users** screen allows a TeXT Company to create, modify and delete TeXT Users.

Switch Company

8MS TeXT supports resellers and provides the concept of sub-companies under a reseller. To support this, a parent company needs to be able to switch to any of it's sub-companies to allow the parent company to manage the sub-company's data.

API Changes

For interacting with Aerialink, a new set of API calls have been added, several existing 8MS TeXT calls have been modified and the remaining existing 8MS TeXT calls have been removed.

- **TextActivate** allows a single number to be activated on 8MS TeXT.
- **TextDisconnect** allows a single number to be disconnected from 8MS TeXT.
- **BatchTextActivate** allows a list of numbers to be activated on 8MS TeXT.
- **BatchTextDisconnect** allows a list of numbers to be disconnected from 8MS TeXT.
- **TextAgentChange** allows a Conversations Agent to be created or modified.
- **TextAgentQuery** allows a Conversations Agent to be viewed.
- **TextApiChange** allows a TeXT API to be created or modified.
- **TextApiDelete** > allows a TeXT API to be deleted.
- **TextApiQuery** allows a TeXT API to be viewed.
- **TextCompanyChange** allows a TeXT Company to be created or modified.
- **TextCompanyQuery** allows a TeXT Company to be viewed.
- **TextCredentialChange** allows an Aerialink Credential to be created or modified.
- **TextCredentialDelete** allows an Aerialink Credential to be deleted.
- **TextCredentialQuery** allows an Aerialink Credential to be viewed.

TextEndpointChange allows an Aerialink Endpoint to be created or modified.

- **TextEndpointDelete** allows an Aerialink Endpoint to be deleted.
- **TextEndpointQuery** allows an Aerialink Endpoint to be viewed.
- **TextFirewallChange** allows an Aerialink Firewall configuration to be created or modified.
- **TextFirewallDelete** allows an Aerialink Firewall configuration to be deleted.
- **TextFirewallQuery** allows an Aerialink Firewall configuration to be queried.
- **TextGroupChange** allows a Conversations Group to be created or modified.
- **TextGroupDelete** allows a Conversations Group to be deleted.
- **TextGroupQuery** allows a Conversations Group to be queried.
- **TextUserChange** allows an 8MS TeXT user to be created or modified.
- **TextUserDelete** allows an 8MS TeXT user to be deleted.
- **TextUserQuery** allows an 8MS TeXT user to be viewed.

The following list of API calls, used for the previous 8MS TeXT system, have been removed.

- TextRecordQuery
- TextAutoResponseChange
- TextAutoResponseDelete
- TextAutoResponseQuery
- TextOptinChange
- TextOptinDelete
- TextOptinQuery
- TextPortalClientChange
- TextPortalClientQuery
- TextPortalUserChange
- TextPortalUserQuery
- TextUsageReport

Release 13.1

8MS 13.1

Release 13.1 of 8MS contains enhancements to the ROC feature, based on changes Somos introduced in their ROC API. Below is a summary of the changes.

- LOA verification is no longer specified when submitting a ROC request.
- Provide the ability to search for ROC requests by specific RespOrg in addition to Entity.
- Provide the ability to search for Open and Closed ROC requests.
 - An Open ROC Request is a request that has at least one number which has not been either approved or declined.
 - A Closed ROC Request is a request for which all numbers have been either approved or declined.
- Allow users to specify multiple reasons for Declining a ROC request.

- In addition to Approve, users may now do a Pending Approve, which performs the approve when the ROC request due date is reached. If the Pending Approve has not yet been executed, the user has the option to cancel that Pending Approve.
- Provide the ability to completely cancel a ROC request rather than removing the numbers in the request.
- Provide the ability to verify that a Somos ROC login registered for 8MS is correctly configured at Somos.

ROC Submit Request

The LOA Verification drop-down has been removed.

ROC Management

A *Progress* drop-down has been added, allowing users to restrict a search to Open and Closed requests.

A *Resp Org* field has been added, allowing users to restrict a search to a specific Resp Org within an Entity.

The list of matching requests now shows *New Resp Org*, allowing a distinction between the Resp Org of the user that has submitted the request and the actual Requesting Resp Org.

The detail area, which shows a specific ROC Request, now provides the ability for a Controlling Resp Org to send a *Pending Approve*, which allows a user to approve a request but tells Somos to execute that approve on the due date of the request. This area also provides the ability to do a *Cancel Pending Approve* as long as the due date has not yet been reached. The Requesting Resp Org also has the ability to cancel an entire request rather than just deleting all numbers from that request.

The *Reason* drop-down list is now a multi-select list, allowing a user to provide multiple reasons for Declining a request.

ROC User Administration

Users may now verify that their Somos ROC login is configured correctly.

API Changes

Several ROC API calls have been modified to reflect the Somos ROC changes.

- **ROCManageRequest** allows additional actions:
 - *pendingApprove* approves the request for the specified numbers when the due date of the request is reached and may only be used by the Controlling Resp Org.
 - *cancelPendingApprove* cancel a *pendingApprove* of a request for the specified numbers. This can only be done if a pendingApprove was previously done and may only be used by the Controlling Resp Org.
 - *cancel* cancels an entire request.

The *rejectcode* parameter is now a comma-separated list, allowing multiple reasons to be specified when rejecting a ROC request.

- **ROCNumberRequest** has removed the *loaverification* and *loacommments* parameters.
- **ROCRetrieveRequests** has added a *resporg* parameter to restrict a search to a specific Resp Org within an Entity. It has also added a *progress* parameter to restrict a search to Open or Closed ROC requests.

Release 13.0

8MS 13.0

Release 13.0 of 8MS contains several new features and many bug fixes. Among the new features are:

- Support for NPA 833, in preparation for the upcoming Somos release
- New API calls for accessing the 8MS special pool
- showing what RespOrgs are currently registered to use the new ROC feature in *SMS Contacts*.
- A beta release of a new, browser-native (non Java-based) version of EditPlan. For this release, the new editor is read-only.

Record Management

For Carrier Express, the *Record Management: Global Crossing* screen allows your Global Crossing login/password to be saved and cleared without sending a request to Global Crossing.

Search/Reserve

833 has been added as a valid NPA in the **800ForAll** section.

Spare # Forecast

833 has been added as a valid NPA.

EditPlan

In recent years, a significant number of users have experienced problems running EditPlan, the CPR editor. Typically the problems have been one of the following:

1. The version of Java installed on a user's PC is considered out-of-date. This is because Java itself considers this a security issue and refuses to run. Upgrading the Java version solves this, but quite often PC management for our users is done by their company's support team and upgrading is often not an option.
2. There are browser or Java configuration problems. This problem is the most frustrating for

both the user and the 8MS support team, as it is time-consuming and difficult to debug a remote PC.

3. The browser does not support Java applets. While 8MS officially only supports two browsers, Internet Explorer 11 (and higher) and Firefox 45 (and higher), we strive to make the user interface work in most modern browsers. Unfortunately, browsers such as Chrome and Microsoft Edge simply do not support the Java plugin.

Beginning with 8MS Release 13.0, we are introducing a new, browser-native, non Java-based version of EditPlan. Because the editor is a complex application, in this first release, the new editor is read-only; CPRs may not be modified or saved. This new version will be available side-by-side with the existing Java applet. In the user interface, users will have the option to use either version, simply by checking a checkbox next to the **EditPlan** button that launches the editor. A side-benefit of providing this read-only version is that users have an alternative to viewing the pdf version of the CPR.

We strongly encourage users to experiment with this new version to provide us feedback. In the long run, we hope to make this a fully-functioning replacement of the Java applet.

[Search Local Text](#)

Additional information has been added to both the search and list frames, making it easier to know the status of texting on a toll-free number.

[SMS Contacts](#)

A *ROC Participant* indicator is shown in the list frame for each SMS/800 contact shown and in the detail frame for a single SMS/800 contact.

[API Changes](#)

For reserving numbers from the 8MS Special Pool, 2 new API calls have been added.

- **SearchSP** searches the 8MS special pool for available matching numbers.
- **ReserveSP** searches the 8MS Special Pool for available matching numbers and performs a Resp Org Change to the requesting Resp Org.

For determining whether or not a RespOrg participates in the Somos ROC feature, one API call has been modified.

- **SMSContacts** returns a *ROC Participant* indicator in the XML response.

Release 12.1

8MS 12.1

Release 12.1 of 8MS adds support for the SMS/800 **ROC Authorization Request** feature. New

screens and API calls have been added to support this feature.

In addition, a new NPA-NXX Carrier Map report has been added to aid in trouble-shooting what carrier a particular NPA-NXX routes to.

ROC Submit Request

A new screen has been added that provides the ability to submit a ROC authorization request.

ROC Management

A new screen has been added that provides the ability to view and manage ROC authorization requests.

NPANXX Carrier Map

A new screen has been added that provides the ability to generate a report of NPA-NXX to carrier routing. The generated report shows all NPA-NXX values explicitly routed to carriers and expands the OTHER branch so every possible NPA-NXX is listed, making it obvious what carrier an NPA-NXX routes to.

ROC User Administration

A new screen has been added that provides the ability to set the SMS/800 API login ID and password for each Entity for which the ROC feature will be used.

API Changes

For interacting with the ROC feature, six API calls have been added for submitting, viewing and modifying ROC authorization requests.

- **ROCDownloadDocument** downloads a document associated with a specific ROC authorization request.
- **ROCManageRequest** provides the ability to modify a ROC authorization request. Specifically, it allows **Incoming** requests to be approved or rejected and **Outgoing** requests to have numbers removed.
- **ROCNumberRequest** provides the ability to submit a new request.
- **ROCRetrieveRequests** provides the ability to search and retrieve requests based on a set of filters.
- **ROCRetrieveRequestDetail** provides the ability to retrieve the detail on a specific request.
- **ROCUploadDocument** provides the ability to upload a document to be associated with an existing request.

Documentation

A new tutorial on removing invalid NPA-NXXs from SMS Templates and 8MS Routing Sets was added to the User Guide.

Release 12.0

8MS 12.0

Release 12.0 of 8MS was an internal release that had no user impact. The release changed the operating system.

Release 11.2

8MS 11.2

Release 11.2 of 8MS adds AT&T Advanced Features for Carrier Express and adds the ability to view 8MS TeXT text message usage charts.

Record Management

The ability to add and remove advanced features for AT&T has been added to the AT&T tab.

Search Local Carrier Express

Viewing advanced features for AT&T has been added to the AT&T tab.

TeXT Usage

Users may view text message usage charts based on a series of filters. The reports may be viewed as line charts, bar charts or a textual format. Additional filter settings allow users to specify how they want data gathered.

API Changes

For interacting with Carrier Express, four API calls have been modified to support AT&T advanced features.

- **CarrierExpressActivate** adds AT&T advanced features parameters.
- **CarrierExpressChange** adds AT&T advanced features parameters.
- **BatchCarrierExpressActivate** adds AT&T advanced features parameters.
- **BatchCarrierExpressChange** adds AT&T advanced features parameters.

Release 11.1

8MS TeXT 1.3

Release 1.3 of 8MS TeXT adds the following enhancements in text processing.

- Long text messages (greater than 160 characters) are concatenated back together where possible.
- Auto Response was enhanced to provide better *stop* and *help* processing.

8MS 11.1

Release 11.1 of 8MS modifies the appearance and improves performance of the simple "box-like" screens, including

- Number Admin
 - Change RespOrg
 - Delete from SMS
 - Number Mgmt
 - Query
 - Query Update Rate
 - Retrieve
 - Spare
 - Transfer
 - Trouble # Query
- SMS Templates
 - Delete Template from SMS
 - Disconnect SMS Template
 - Query Template
 - Retrieve Template
 - Transfer Template
- System Admin
 - Change Password

Release 11.0

8MS TeXT 1.2

Mobile user Opt-In Authorization has been refined for better control of text delivery to mobile users. In conjunction with 8MS Release 11.0, the ability to manage mobile user Opt-In Authorization has been added. Below are the rules that define how Opt-In Authorization is managed.

- A toll-free user may never send a text message to a mobile user unless an Opt-In

Authorization record exists for a toll-free number/mobile number combination.

- An Opt-In Authorization record is created or updated whenever a text is received from a mobile user.
- The life-span of an Opt-In Authorization record is set to a system-wide number of days.
- An Opt-In Authorization record is removed by 8MS TeXT when the record has reached its life-span.
- A mobile user may ask to receive a text message through some other form of communication (e.g. email, telephone). Under this condition, a toll-free user may then manually create an Opt-In Authorization record. This allows the toll-free user to send a text message to the mobile user without first receiving one.
- The 8MS API and User Interface provide the ability to view, create and delete Opt-In Authorization records. Management of Opt-In Authorization records is controlled by the managing Resp Org. This is discussed below in the 8MS 11.0 release notes.

8MS 11.0

Release 11.0 of 8MS adds Impact Tel as a new carrier under Carrier Express. Numbers may now be activated on the Impact Tel network. In addition, new screens and API calls have been added for management of 8MS TeXT Opt-In Authorization records. Finally CSF security forms for 8MS, 8MS TeXT and Carrier Express, as well as the *8MS Text* API Guide, are now available from within the User Interface.

Record Management

An Impact Tel tab has been added. Users may activate numbers at the Impact Tel network and modify existing number data.

Disconnect

An Impact Tel tab has been added. Users may disconnect numbers at the Impact Tel network.

Search Local Carrier Express

An Impact Tel tab has been added. Users may view old records sent from 8MS to Impact Tel.

Opt-In Authorization Management

As described above in the **8MS TeXT 1.2** section, management of Opt-In Authorization has been introduced. Opt-In Authorization records can be created and deleted from this screen.

Search Opt-In Authorization

In an interface much like the *Search Local* screens, this screen provides the ability to view Opt-In Authorization records.

[Documentation](#)

This page now contains all CSF administrative forms for access to 8MS, 8MS TeXT and Carrier Express. In addition, the 8MS TeXT API Guide has been added. The 8MS TeXT API is used for exchanging text messages between toll-free numbers and mobile numbers through the 8MS TeXT system.

[API Changes](#)

For interacting with Carrier Express, four API calls have been modified. For interacting with 8MS TeXT, three new API calls have been added for management of Opt-In Authorization records.

- **CarrierExpressActivate** now allows a single number to be activated at the Impact Tel network.
- **CarrierExpressDisconnect** now allows a single number to be disconnected at the Impact Tel network.
- **BatchCarrierExpressActivate** now allows a list of numbers to be activated at the Impact Tel network.
- **BatchCarrierExpressDisconnect** now allows a list of numbers to be disconnected at the Impact Tel network.
- **TextOptinChange** allows the creation and modification of Opt-In Authorization records within 8MS TeXT.
- **TextOptinDelete** allows the deletion of Opt-In Authorization records within 8MS TeXT.
- **TextOptinQuery** allows querying of Opt-In Authorization records from 8MS TeXT.

As a reminder, in release 10.0 of 8MS, it was announced that support for the equals sign in the *reqparams* parameter was officially deprecated. The code that supports the equals sign will be removed in a future release. We **strongly** urge all API developers to modify their API client code to use the tilde (~) character in place of the equals sign.

Release 10.3

8MS TeXT 1.1

In conjunction with 8MS Release 10.3, the Auto Response feature has been enhanced to make it more flexible and powerful. The following enhancements have been made.

- Auto Responses may be company-wide or associated with a specific Portal Client.
- Multiple responses may be sent back to the originating mobile user.
- Mobile users may "optout" to indicate they do not want any further texts from this toll-free number.
- Matching patterns against a text may be done with an *exact* match in which the text must match the pattern exactly (ignoring case) or with a *contains* match in which the pattern exists within the text.

8MS 10.3

Release 10.3 of 8MS enhances 8MS TeXT provisioning.

Record Management

The Portal Client is no longer a required field.

Auto Response

As described above in the **8MS TeXT 1.1** section, Auto Response has been enhanced. The features described in that section are provisioned in this screen.

API Changes

For interacting with 8MS TeXT, seven new API calls have been added and two have been modified. The new API calls provide the ability to completely automate provisioning of 8MS TeXT data.

- **TextActivate** now allows the portalclientid parameter to be optional. It also adds support for Company-wide or Portal Client specific Auto Responses.
- **BatchTextActivate** now allows the portalclientid parameter to be optional. It also adds support for Company-wide or Portal Client specific Auto Responses.
- **TextAutoResponseChange** allows an Auto Response to be created or modified.
- **TextAutoResponseDelete** allows an Auto Response to be deleted.
- **TextAutoResponseQuery** allows an Auto Response to be queried.
- **TextPortalClientChange** allows a Portal Client to be created or modified.
- **TextPortalClientQuery** allows a Portal Client to be queried.
- **TextPortalUserChange** allows a Portal User to be created or modified.
- **TextPortalUserQuery** allows a Portal User to be queried.

Release 10.2

8MS TeXT 1.0

In conjunction with 8MS Release 10.2, CSF Corporation is proud to announce the release of **8MS TeXT**, a new system to allow sending and receiving of text messages to toll-free numbers. After a number has been activated for texting at 8MS TeXT, cell phone users may send a text to that number. The text is passed on to the 8MS TeXT system, which, in turn, delivers the text through one or more mechanisms defined in the number activation process. Individuals on the toll-free side receive these text messages and may then reply back to the originating cell phone user, allowing a normal two-way texting conversation. For this first release, there are five different mechanisms for delivery, described below.

8mS TeXT Portal

8MS TeXT Portal is a web-based user interface that allows users to view text messages sent to their toll-free numbers and reply back to the originating cell phone users.

API Client

8MS TeXT provides an API which allows a company to receive text messages addressed to their toll-free numbers and to reply back to those messages. This API enables a company to fully integrate toll-free texting with the company's core business.

Auto Response

A company may define a set of patterns and responses. A pattern can be a single word or a combination of words. This set of patterns and responses is associated with one or more toll-free numbers. When a text message is received, each pattern is matched against the text message. If a pattern matches, the associated response is returned back to the originating cell phone user. A default response may also be defined; if no pattern matches, then the default response is returned.

Turnaround

Every text received can be forwarded on to one or more cell phones. Up to ten cell phones may be specified.

Email

Every text received can be forwarded on to one or more email addresses. Up to ten email addresses may be specified.

8MS 10.2

Release 10.2 of 8MS introduces an interface to 8MS TeXT, which allows activation of text delivery to toll-free numbers. Existing 8MS screens have been modified to cleanly integrate 8MS TeXT provisioning, allowing it to be treated in a manner similar to SMS/800 and Carrier Express activity. To support texting features, a new menu group, 8MS TeXT, has been added to the user interface menu. API calls to interface through 8MS to 8MS TeXT have also been added.

As always with 8MS, both single numbers and batches of numbers may be activated and disconnected. Batches may be run based on dynamically created lists of numbers, named Number Lists or 8MS Templates. The status of messages sent to 8MS TeXT may be checked using the Activity Log and Batch Log screens. API calls are also available through 8MS to 8ms TeXT.

All new features and enhancements are described below, organized by functional area. User documentation has been updated to reflect these changes.

Record Management

An 8MS TeXT tab has been added. Users may activate numbers for texting at 8MS TeXT. Activation includes loading the numbers on carriers for text delivery and specifying how texts sent to a toll-free number should be processed by 8MS TeXT.

Disconnect

An 8MS TeXT tab has been added. Users may disconnect numbers at 8MS TeXT. These numbers are then removed from carriers, disabling text delivery.

8MS TeXT Menu

A new 8MS TeXT category has been added to the menu. It provides functions necessary to provision and support the 8MS TeXT system.

API Client

8MS TeXT provides an API for sending and receiving text messages, allowing a company to build its own toll-free texting client. This screen provides the ability to define an 8MS TeXT API Client.

Auto Response

An Auto Response is a set of patterns and responses used by 8MS TeXT for automated responses to a cell phone user that sends text messages to a toll-free number. This screen provides the ability to create, modify and delete Auto Responses.

TeXT/Portal Company

To allow activation of toll-free texting it is first necessary to create a company on the 8MS TeXT and 8MS TeXT Portal systems. This screen provides the ability to create, enable and disable 8MS TeXT and 8MS TeXT Portal companies.

Portal Client

Users may log in to the 8MS TeXT Portal to view and send toll-free text messages. To grant users access to the 8MS TeXT Portal, a company must create an 8MS TeXT Portal Client. This screen provides the ability to create, modify, enable and disable 8MS TeXT Portal Clients.

Portal User

This screen provides the ability to create, modify, enable and disable 8MS TeXT Portal Users.

Search Local 8MS TeXT

The Search Local 8MS TeXT screen provides the ability to view delivery data for toll-free numbers that have texting capability.

Activity Log

The Activity Log screen adds the ability to view GUI and API activity related to 8MS TeXT activations and disconnects.

[Batch Log](#)

The Batch Log screen provides the ability to track the status and progress of batches of toll-free numbers being sent to SMS/800. In this release Batch Log adds the ability to track the status and progress of batches of toll-free numbers being sent to the 8MS TeXT system.

[API Message Status](#)

The API Message Status screen adds the ability to view 8MS client API requests to and from the 8MS TeXT system.

[API Changes](#)

For interacting with 8MS TeXT, four new API calls have been added.

- **TextActivate** allows a single number to be activated on 8MS TeXT.
- **TextDisconnect** allows a single number to be disconnected from 8MS TeXT.
- **BatchTextActivate** allows a list of numbers to be activated on 8MS TeXT.
- **BatchTextDisconnect** allows a list of numbers to be disconnected from 8MS TeXT.

Release 10.1

Release 10.1 of 8MS is a small point release that provides several enhancements.

[Choice Lists](#)

In previous releases, wherever the Number List drop-down list appeared, it was possible to click on the button to the right of the list to change the view from Favorites and Most Recently Used items to all items. The Number List filter button has been enhanced to provide a third view of the data, all Number Lists created with your user id. In addition, the button may now be clicked to toggle between views. The ability to toggle through views has also been added to the SMS Templates and 8MS Routing Sets drop-down lists.

[Number History](#)

SMS/800 limits number history to data less than 7 years old. Prior to SMS/800 deleting their old data, CSF Corporation archived all this number history. The Number History screen has been enhanced to provide the additional history that is no longer available from SMS/800.

[SMS Template History](#)

A new screen has been added that provides access to SMS Template history, in a manner similar to the Number History screen.

[API Changes](#)

- In the previous release of 8MS, the ability to view SMS Contact notes was added. The **SmsContacts** API call now returns notes as well.
- The **SmsTemplateHistory** API call has been added. This provides the ability to retrieve SMS Template history from the SMS/800 database.

Release 10.0

Release 10.0 of 8MS adds AT&T as a new carrier under Carrier Express. Numbers may now be activated on the AT&T network.

Three usability changes have also been made.

1. The Shortcuts feature, introduced in the previous release, is now turned on for all users by default.
2. Users may now modify their phone number and email address.
3. Any notes associated with SMS/800 contact data is now shown.

In addition to the above features, support for NPA 844 has been added.

Finally, an unsupported parameter format will be removed in the API in a future release. Please note this description below if you use the 8MS API.

Shortcuts

The **Shortcuts** feature, introduced in release 9.4, was turned off by default. To access this feature users were required to set the preference for their login id. In this release the default for Shortcuts has been changed to *on* for all users. Shortcuts may always be turned off for a user via the **User Preferences** screen, or for all users in a company via the **Company Preferences** screen.

Change Password

Release 9.4 introduced the ability for users to reset their own password from the **Login** screen. Resetting a user's password required knowing the email address associated with that user. Users were unable to modify their password without contacting the 8MS help desk. In this release the **Change Password** screen has added the ability to view and modify the email address and phone number for a user.

SMS Contacts

Any notes associated with a Resp Org are now shown in the detail frame for a single SMS/800 contact.

Record Management

An AT&T tab has been added. Users may activate numbers at the AT&T network, modify existing number data, and move numbers.

Disconnect

An AT&T tab has been added. Users may disconnect numbers at the AT&T network.

Search Local Carrier Express

The *Carrier* drop-down list has been replaced with tabs, one tab for each carrier.

An AT&T tab has been added.

Search/Reserve

844 has been added as a valid NPA in the **800ForAll** section.

Spare # Forecast

844 has been added as a valid NPA.

API Changes

For interacting with Carrier Express, four API calls have been modified and two new calls has been added.

- **CarrierExpressActivate** now allows a single number to be activated at the AT&T network.
- **CarrierExpressDisconnect** now allows a single number to be disconnected at the AT&T network.
- **BatchCarrierExpressActivate** now allows a list of numbers to be activated at the AT&T network.
- **BatchCarrierExpressDisconnect** now allows a list of numbers to be disconnected at the AT&T network.
- **CarrierExpressChange**, a new call, allows a single number to be modified or moved at the AT&T network.
- **BatchCarrierExpressChange**, a new call, allows a list of numbers to be modified or moved at the AT&T network.

The *reqparams* parameter in the API is a set of semicolon-separated, name/value pairs that define the parameters for the particular 8MS request being made. Each name/value pair is separated by the tilde (~) character. The API currently also allows the equals (=) character to be used as a name/value pair separator, although this is undocumented. Beginning with this release, support for the equals sign in *reqparams* is officially deprecated. The code that supports the equals sign will be removed in an upcoming release. We urge all API developers to modify their API client as soon as possible.

Release 9.4

Release 9.4 of 8MS is designed to offer more flexibility and improve user efficiency.

Shortcuts

Shortcuts are menu items generally intended to execute the primary function of a particular screen without leaving the current screen. Shortcuts also provide a more direct way for users to execute specific functions on a particular piece of data. For example, from any of the Search Local screens, clicking on a toll-free number will display a shortcuts menu that allows a user to generate an SMS/800 request such as a: *Query*, *Retrieve* or *Trouble Referral Query*, Local data such as a list from the *Activity Log*, *Search Local Number*, or *Search Local Record* is also available. Responses to these requests are displayed in a pop-up window.

For this release, shortcuts have been added to the following data items: toll-free numbers, 8MS Routing Sets, SMS Templates, Resp Orgs, and User and Company names. Shortcuts are available from each of the *Search Local* screens, as well as the detail frame of *Activity Log* and *Batch Log*.

Accessibility to shortcuts is based on per-screen permissions. In other words, if a user does not have access to a particular screen, the user will not have access to the equivalent shortcut. Data items with available shortcuts will display in a different color than other items. This color is customizable via the **ShortcutsColor** preference.

By default, Shortcuts are disabled. To enable Shortcuts, set the User Preference **Shortcuts** to the value *1*.

List Striping and Highlighting

To make individual rows in lists of data easier to view, odd and even rows are now shown in different colors, making it visually easier to track data for a single row across all columns. In addition, when the mouse floats over a particular row, the row is highlighted in a different color.

By default, Striping and Highlighting are enabled. To disable Striping, set the User Preference **RowStripeColors** to the value *disable*. To disable Highlighting, set the User Preference **RowHighlightColors** to the value *disable*.

Lists of Results

The number of records that will be returned and displayed on certain screens such as *Activity Log* and the *Search Local* screens is limited by the screen's corresponding **DisplaySize** and **MaxRetrieve** User Preferences. These preferences are designed to avoid increased wait times when retrieving data. In this release, when a user reaches their defined limit of results to retrieve, a pop-up window will appear advising the user on whether or not they would like to retrieve more data or refine their search.

In the previous release, a **Numbers Only** checkbox was added to list results, making it easy to copy and paste all numbers in a list. In this release, this checkbox has been changed to a link and two additional features were added to the list results. The first feature provides the ability to change the number of records per page being shown. The second feature provides the ability to hide the filter area on the screen, providing more space for viewing the list results.

Per-Screen User Preferences

The *User Preferences* screen provides the ability to modify any user preference. In this release, a *User Preferences* button  has been added to all screens:

The button is located in the upper right hand corner of the screen and to the left of the User Guide button. Clicking the User Preferences button will launch a pop-up window that displays only the preferences that are relevant to the user's current screen.

Search/Reserve

The *Search/Reserve* screen has enhanced searching capabilities, unavailable in SMS/800, which use proprietary **800ForAll** technology developed by CSF Corporation. This includes the following enhancements:

- Users are no longer restricted to searching for vanity phrases of exactly 10 digits. Instead, users may now search by phrases of less than or greater 10 digits. The search does not require the 8xx NPA to be entered. It may be something short, such as *cat* or *dog*. It may also be something long and allow trailing digits, such as *800-software*.
- Prior to this release, 8MS was limited to SMS/800's * and & characters for wildcard and digit-repeat matching. In this release, users may now also use a double digit-repeating character of %. Now, a search may use both & and %, where & represents any single-digit match and % represents any other single-digit match. For example, a user may search for *800***&%&%*, which would return numbers such as *800-123-4545*.
- Performance on searching for contiguous numbers has been greatly enhanced.

SMS Template/8MS Routing Set Counts

When an SMS Template or an 8MS Routing Set is selected from a drop-down list on any screen, a count of numbers is displayed to the right of the drop-down. In cases where a large amount of toll-free numbers has been associated with an SMS Template or 8MS Routing Set, displaying the count may decrease performance. In this release, User Preferences have been added to disable the count feature.

Trouble Number Query

The *Trouble Number Query* screen has been enhanced to provide the most accurate information about a number. With the normal SMS/800 *Trouble Referral Query* query, if a number was in the *Reserved* or *Spare* state, then SMS/800 would fail because the number had no records. Now, users may find a number's associated contact information from within a single screen. 8MS will automatically execute a *Number Query* on the number. If the number is *Reserved*, then a *Trouble Referral Query* is executed on the owning Resp Org. If the number is *Spare*, then that information is shown.

Password Reset

The *Login* page now provides a *Password Reset* link. The user login and email id (as specified for this user within 8MS) must be entered. If valid, and if the user has permission to access the *Change Password* screen, the password will be modified and an email sent to the user.

[Record Management](#)

For Carrier Express, the *Record Management: Global Crossing* screen now provides Divcode and POTS data. Users may now specify this data on an Activate or a Change. Users may also move numbers from one Sub-Account to another.

[EditPlan](#)

Label Builder screens that contain a large set of values displayed as a grid of buttons now provide the ability to hide selected and unselected values. This includes the following *Label Builder* screens: *Area Code LATA NXX* and *Six Digit*.

All *Label Builders* screens now provide a **View** button, which allows users to view a label's definition as a formatted or CSV (comma-separated values) list, allowing the label's values to be copied/pasted.

[Search Local Number/Record](#)

The *Search Local Number* and *Search Local Record* screens provide the ability to search for numbers and records based on a series of filters. Among the many filters available is a Number List drop-down. In this release, users may now enter a list of numbers without having to first create a Number List.

[SMS Template Query](#)

A new *SMS Template Query* screen has been added and serves as the SMS Template equivalent of the toll-free number *Query* screen. This feature allows an SMS Template to be queried on SMS/800.

[Activity Log](#)

The ability to filter by SMS Template has been added.

The ability to create a Number List from any batch item has been added. The button for this will appear to the left of the item.

The **Apply** button has been replaced with **Retrieve** and **Retrieve All** to allow users to view all activity records in a single page.

[Usage Counts](#)

The total number count has been added and is displayed to the right of the maximum numbers.

Release 9.3

Release 9.3 of 8MS completes outstanding features related to SMS Templates, which were added

in 9.1. In addition it provides a series of enhancements to the user interface, and adds new API calls.

Application Menu

The Application Menu now provides the ability to select items as favorites, allowing the menu to be limited to only those menu items that are often used. Users may toggle between all available menu items and just the favorites.

Copy Record

When an SMS/800 PAD record is selected as the source of a copy record action, the SMS Template name being pointed at by this record is shown below the Toll-Free Number Date/Time drop-down list.

Delete from SMS

A Date/Time drop-down list has been added to this screen, allowing users to optionally select the source date rather than typing it.

Search Local Screens

The list results (bottom) frame of *Search Local Number*, *Search Local Record*, and *Search Local Carrier Express* have had a *Numbers Only* checkbox added. Selecting this checkbox changes this frame from a list of details to a list of plain-text toll-free numbers; all other detail and links are removed. This allows the found set of numbers to be easily selected, copied and then pasted into the *List of Numbers* field of other 8MS screens or into other applications.

Search Local Carrier Express

The RespOrg field on this screen previously searched for records whose RespOrg exactly matches the specified RespOrg. In the previous release, this field was modified for *Search Local Number* and *Search Local Record* to allow partial matching. In this release, *Search Local Carrier Express* has been modified to allow this same partial matching on Resp Org.

Transfer

If a toll-free number's record is a PAD record and is not on 8MS, doing a transfer causes the record to be converted to a CAD record on SMS/800. The *Transfer* screen now only allows a transfer if the number's record is on the 8MS platform. For a batch Transfer, the validation results may be viewed in the **Activity Log**.

SMS Template Management

The *Approval* and *Schedule Status* fields, shown on the *CAD* and *PAD* tabs of *Record Management*, are now shown on the *SMS Template Management* screen.

An *SMS Template* drop-down list has been added to the *Schedule* (destination) section of the

SMS Template Management screen, allowing users to select an existing SMS Template rather than having to type the SMS Template name in.

Delete SMS Template from SMS

A Date/Time drop-down list has been added to this screen, allowing users to optionally select the source date rather than typing it.

SMS Template Info

A new *SMS Template Info* screen has been added under the *SMS Templates* menu. This screen, similar in function to the *Routing Set Info* screen, allows users to see how many numbers are pointing at SMS Templates and also allows Number Lists to be created.

Retrieve SMS Template

A new *Entity* field has been added to the *Retrieve SMS Template* screen. This allows users to download all SMS Templates under a specific 2-character SMS/800 Entity code.

Welcome Page

The *Welcome* page, seen immediately after logging in to 8MS, is now available as a menu option under the *System Activity* menu. This allows users to view notices that have been posted after they have logged in to the system.

CPRGen

CPRGen, the CPR generation add-on feature, allows CPRs to be generated for toll-free numbers. In this release, CPRs for SMS Templates may now also be generated.

Batch 'Numbers' List

The *Numbers* text area on *Copy Record* and all batch pop-ups has been restricted to pasting no more than 2000 numbers into it. In this release, this value has been increased to 10,000 numbers.

API Changes

One existing API call was modified for retrieving SMS Templates.

- **SmsTemplateRetrieveAll** now accepts an Entity (tren) field, allowing all SMS Templates under a specific 2-character SMS/800 Entity code to be downloaded.

New API calls have been added for SMS Templates and local data.

- **SmsTemplateList** queries for a list of all SMS Template names.
- **SmsTemplateQuery** allows querying the status of an SMS Template record.
- **SmsTemplateScpQuery** allows querying the status of an SMS Template record on one or

more SCPs.

- **SmsTemplateScpResend** allows the Active record of an SMS Template to be resent to one or more SCPs.
- **SearchLocalRec** allows querying the status and CICs specified in the CAD or CPR of local records on 8MS.

Release 9.2

Release 9.2 of 8MS is a small point release that adds two new features.

SMS Template CPR Management

SMS Template CPR Management is the SMS Template equivalent of CPR Management. It provides the ability to view SMS Template CPRs, modify the *Expires* date on a Local SMS Template CPR and delete one or more Local SMS Template CPRs.

Unsolicited Message Management

SMS/800 provides the ability to allow or block sending of unsolicited messages to 8MS. This feature, while still available in SMS/800, is now also managed on 8MS. Thus, a company may request to temporarily turn on or off unsolicited messages on 8MS without the intervention of SMS/800.

Release 9.1

Release 9.1 of 8MS introduces SMS Templates to 8MS, a feature that was added to SMS/800 at the same time. SMS Templates provide a way to define routing logic that is independent of the toll-free number record. In this way, routing may be updated without the need to update all toll-free numbers using that routing.

Existing 8MS screens have been modified to integrate SMS Templates into 8MS in a manner consistent with other SMS/800 data. API calls for managing SMS Templates have also been added. In addition to SMS Templates, this release provides a new method for creating labels by copying and pasting data into the new Label Builder pop-up. Label Builder provides intelligent parsing of the data, making it easy for users to create multiple labels.

Record Management

Formerly known as CAD Management, Record Management provides the ability to send one or more toll-free number records to SMS/800. In this release, the PAD tab is added to allow numbers to point at SMS Templates. An SMS Template may also be used as the source for populating the CAD screen, allowing SMS Template data to be used to create a CAD record.

Copy Record

The Copy Record screen provides the ability to copy a toll-free number's record to a list of toll-free numbers. In this release, Copy Record adds the ability to use an SMS Template as a source, allowing Pointer (PAD) records to be sent to SMS/800. In addition, an SMS Template may be used as the destination (similar in concept to using an 8MS Routing Set as a destination), allowing all numbers on the 8MS platform pointing at a particular SMS Template to be easily re-routed.

Search Local Number/Search Local Record

The RespOrg field on both of these screens searches for records whose RespOrg exactly matches the specified RespOrg. In this release, this field now accepts less than the full length RespOrg. If less than 5 characters are specified, the search looks for numbers/records that match the left part of the specified RespOrg.

Plan Editor

The Plan Editor provides the ability to edit CPRs and labels. In this release, the Plan Editor allows local SMS Template CPRs, as well as toll-free number local CPRs to be opened and saved.

Plan Editor - Label Builder

A new Label Builder pop-up has been added that provides a method for creating labels by copying and pasting data into the pop-up and then parsing that data into useful label groups. For example, a list of POTS numbers can be converted into AreaCode, NXX, SixDigit or TenDigit labels.

Batch Popups

All Number Admin screens that provide the ability to send messages to SMS/800 provide a batch pop-up that allows a list of numbers to be sent as a batch. In this release, all batch pop-ups allow an SMS Template to be used to specify the list of numbers, similar in concept to using an 8MS Routing Set. This allows all numbers on the 8MS platform pointing at a particular SMS Template to become the list of numbers for the batch.

SMS Templates Menu

A new SMS Templates category has been added to the menu. It is similar in function to the Number Admin menu, providing equivalent Number Admin functions to SMS Template data.

SMS Template Management

The Template Management screen provides the ability to create and modify SMS Template records. New SMS Templates are created when the first record for an SMS Template is sent to SMS/800. This screen may be populated with a toll-free number's record or an 8MS Routing Set, providing an easy way to convert a number record into an SMS Template record.

Delete Local SMS Template

Just as toll-free numbers and associated records are stored on 8MS, SMS Templates are also

stored. Delete Local SMS Template provides the ability to delete an SMS Template from the local 8MS database.

Delete SMS Template from SMS

SMS Template records are scheduled on SMS/800. Delete SMS Template from SMS provides the ability to delete a Pending SMS Template record.

Disconnect SMS Template

This screen provides the ability to disconnect an SMS Template, taking the SMS Template out of service and removing it from the SMS/800 database.

Retrieve SMS Template

Retrieve SMS Template provides the ability to retrieve an SMS Template from SMS/800 and store it on the local 8MS database.

Search Local SMS Template

Search Local SMS Template provides the ability to search SMS Templates stored on the local 8MS database. Searching may be done based on criteria similar to the Search Local Rec screen.

Transfer SMS Template

SMS Template records are scheduled on SMS/800. Transfer SMS Template provides the ability to change the date/time of a Pending SMS Template record.

8MS Routing Sets Menu

The Template Admin menu has been renamed to 8MS Routing Sets, Template Info has been renamed to Routing Set Info and Template Mgmt has been renamed to Routing Set Mgmt.

API Changes

New API calls have been added for SMS Templates.

- **PointerRecordChange** allows a toll-free number to be pointed at an SMS Template.
- **SmsTemplateChange** creates a new SMS Template record.
- **SmsTemplateDelete** deletes an existing Pending SMS Template record.
- **SmsTemplateDisconnect** disconnects an existing SMS Template.
- **SmsTemplateResend** resends an existing SMS Template record to all SCPs.
- **SmsTemplateRetrieve** retrieves SMS Template records from SMS/800.
- **SmsTemplateRetrieveAll** retrieves all SMS Template records from SMS/800.
- **SmsTemplateTransfer** transfers a Pending SMS Template record to a new date/time.

Release 9.0

Release 9.0 of 8MS introduces an interface to Carrier Express, which allows activation of records on carriers' networks. Existing 8MS screens have been modified to cleanly integrate Carrier Express activity, allowing it to be treated in a manner similar to SMS/800 activity. API calls to interface through 8MS to Carrier Express have also been added. In addition to Carrier Express, this release provides access to new SMS/800 MGI calls that allow querying from an SCP and resending records to an SCP, giving users more control over their data at the carriers' SCPs.

CAD Management

The CAD Management screen provides the ability to send one or more toll-free number records to SMS/800. In this release, CAD Management adds the ability to activate one or more numbers on carriers' networks.

Disconnect

The Disconnect screen provides the ability to disconnect a toll-free number at SMS/800. In this release, Disconnect adds the ability to disconnect a number from carriers' networks.

SCP Status

In release 8.0, the ability to check the status of a record at all SCPs was introduced. The information shown (on the *CAD Management* and *Search Local Rec* screens) was based on unsolicited messages received from SMS/800 which reflect the most recent unsolicited data provided by SMS/800.

SMS/800 recently introduced new MGI messages which allowed querying the status of a record on an SCP and resending a record to a specific SCP. In this release, 8MS takes advantage of these new MGI messages. When viewing the SCP status information there will now be two new buttons next to each SCP status provided. These buttons provide the ability to query the status of a record at an SCP and resend a record to an SCP.

Search Local Carrier Express

The Search Local Record screen provides the ability to view old, sending, active and pending records on SMS/800. In this release a new screen with similar functionality provides the ability to view records that have been activated at one or more carriers.

Activity Log

The Activity Log screen adds the ability to view GUI and API activity related to Carrier Express activations and disconnects.

Batch Log

The Batch Log screen provides the ability to track the status and progress of batches of toll-free numbers being sent to SMS/800. In this release Batch Log adds the ability to track the status and progress of batches of toll-free numbers being sent to Carrier Express.

API Message Status

The API Message Status screen adds the ability to view 8MS client API requests to and from Carrier Express.

Carrier Express Message Status

The Carrier Express Message Status screen is a new screen that provides the ability to view messages to and from Carrier Express. This screen works in a manner very similar to the SMS/800 Message Status screen, which shows messages to and from SMS/800.

API Changes

For interacting with Carrier Express, four new API calls have been added.

- **CarrierExpressActivate** allows a single number to be activated on a single carrier.
- **CarrierExpressDisconnect** allows a single number to be disconnected from a single carrier.
- **BatchCarrierExpressActivate** allows a list of numbers to be activated on a single carrier.
- **BatchCarrierExpressDisconnect** allows a list of numbers to be disconnected from a single carrier.

For interacting with SMS/800 to an SCP, four new API calls have been added.

- **ScpQuery** allows a single number to be queried at one or more SCPs.
- **ScpResend** allows a single number to be resent to one or more SCPs.
- **BatchScpQuery** allows a list of numbers to be queried at one or more SCPs.
- **BatchScpResend** allows a list of numbers to be resent to one or more SCPs.

Release 8.0

Release 8.0 of 8MS contains new features, usability enhancements, bug fixes and performance improvements.

SCP Status

The latest SCP status information for a toll-free number's schedule record can now be viewed. When SCP status data is available, a green image containing the letters **SCP** will appear on the **Cad Management** screen and the **Search Local Rec** screen. This information is based on unsolicited messages received from SMS/800 and reflects the most recent unsolicited data provided by them.

Number Management

The ability to update the notes, contact name and contact number on a toll-free number's schedule record has been available in 8MS for many releases. You may now update the notes, contact name and contact number on the toll-free number itself. Additionally, because of the MGI message used to update this data, you may change the status of any of your *Transitional* numbers to a status of *Reserved*.

SMS/800 Contacts

The SMS/800 web site (<http://www.sms800.com>) allows you to view Primary and Change Resp Org Contacts. This data is now available from within 8MS at the **SMS/800 Resp Org Contacts** screen under the **System Activity** category.

LCRGen

LCRGen is a tool for generation of CPRs applying a *Least Cost Routing* algorithm based upon call usage records. The LCRGen feature now provides a screen for uploading LCR data files. The **LCR Generation** screen can be found under the **CPR Generator** category.

CPRGen

Prior to this release, **CPRGen** did not allow activation of an initial record on a number with a status of *Reserved* or *Transitional*. In this release, **CPRGen** now allows initial activation by including the four required fields (from the **CAD Mgmt** screen) *RAO*, *Bill to Number*, *Listing Name* and *SF Number* (which is used as an alternative to *Order Number*) based on the company preferences *RAO*, *BillToNumber*, *ListName1* and *SFNumber*.

CPRGen now provides a directive to specify Area of Service. The new directive is **ServiceArea**. Valid values match the field names on **CAD Management**: *Network*, *AreaCode*, *Lata*, *State* and *Labels*.

Batch Management

In release 7.0, a new field, **Max Messages per Hour**, was added to all batch screens. This field gave users the ability to limit the flow of messages in a batch to SMS/800. This field may now be given a company-wide or user-specific default value that appears whenever the **Batch** pop-up is accessed for the **Copy Record**, **CAD Management**, or **Disconnect** screens.

Batch Log

Prior to this release, the **Batch Log** provided the ability to control whether or not completed batches were shown. This was controlled by a checkbox labeled *Include Completed Batches*. This single checkbox has been replaced by a set of checkboxes allowing more flexibility in what batches are shown: *New*, *In Progress*, *Complete* and *Scheduled*.

Trouble Number Query Batch

Prior to this release, the **Query** screen provided a comma-separated (CSV) values list as an alternate format to view the results of a query. This CSV list, which could be imported into applications such as **Microsoft Excel**, was accessible from the **Activity Log**. Release 8.0 provides the same ability for the **Trouble Number Query** screen.

Number/Transaction Management

The **Usage Counts** screen is used to track number and transaction usage per company. Until this release, this was the only way for a company to know if they had exceeded any of their company limits. Release 8.0 includes the ability for a user to be alerted when logging into 8MS if the company limits are being approached or exceeded. The alert percentages are tunable per user.

Number List and Template number counts

Whenever a number list or template is selected from a drop-down list, the amount of numbers in the selected number list or template is now shown to the right of the drop-down list.

Tool Tips

Tooltips are now provided for all menu items on the system menu.

API Changes

- A **BatchNumberChange** API call has been added. This is the batch equivalent to the **NumberChange** API call, allowing an API client to update the notes, contact name or contact phone on a toll-free number (rather than a toll-free number's schedule record).
- A **UsageCounts** API call has been added. This call allows an API client to retrieve the maximum amount of numbers, transactions and other counts normally provided in the **Usage Counts** screen.
- A new parameter, *loguserid*, has been added to all API calls. This parameter allows multiple API clients using the same API login to have both the *userid* and *loguserid* be associated with entries in the **Activity Log** thus enabling users to search by either userid.
- Better tracking of API requests is now provided in the **Activity Log**.

Performance Improvements

- The time to load the Number List and Templates drop-down lists has been significantly improved.
- Performance on the **EditPlan SixDigit** label builder has been improved.

Release 7.2

Release 7.2 of 8MS contains usability enhancements and bug fixes. The focus of this release is to provide features that makes day-to-day work a little easier.

Email Support Button

8MS has always provided free help desk support via phone and email. The contact information is posted on the 8MS web site <http://www.8msweb.com>. To make it easier for users to ask questions, all screens now provide an *Email Support* button. Selecting this button brings up your default email composition window. The composition window will be pre-populated with the 8MS support email id 8mscust@csfcorp.com. This button  is to the right of the  (User Guide) button.

Most Recently Used

A new feature has been added which remembers your *Most Recently Used* toll-free numbers, number lists, and routing templates. You may populate screens and/or select values based on these *Most Recently Used* lists.

Number list and routing template selections have always been available from drop-down lists on many screens. For example, the batch generation and Search Local screens always allowed you to select a number list or routing template. However, until this release the only "new" items that would appear on these lists were newly created or modified number lists and routing templates; recently referenced but not modified items would not appear. These drop-down lists will now also show number lists and routing templates that were recently referenced in addition to recently created items. For example, if you create a batch Copy Record (or any other type of batch) and use a number list for your batch, that number list will now appear on the number list drop-down wherever the number list drop-down list is available.

As a completely new concept, a toll-free number choice list is also now available. This choice list will be available as a button with the image . Whenever this image appears next to a text field, click on the image. A pop-up window will appear which contains all your recently referenced toll-free numbers. Select an item from this list and the field will be populated with that toll-free number.

The User Preferences **RecentNumberCount**, **RecentNumberListCount**, and **RecentTemplateCount** will control the number of items shown in the appropriate *Most Recently Used* lists. Note that the recently used lists are only kept for the current session and will be lost when you log out or when your session times out.

Routing Template Report

A pdf report of CAD, LAD and CPR data for a toll-free number or a Routing Template has been available for several years via the **View** button on the **CAD Mgmt** and **Template Mgmt** screens. This report is now available from the **Search Local #**, **Search Local Rec** and **Template Info** screens. The search results frame on the bottom of each of these screens shows a Routing Template name for each line of data. That name is now a link to the pdf report. Clicking on this link is equivalent to clicking on the **View** button on **Cad Mgmt** and **Template Mgmt**.

Trouble Referral Query

The **Trouble Referral Query** screen allows you to enter a Resp Org or a single toll-free number and retrieve a trouble referral phone number, Resp Org and company name for that Resp Org or

toll-free number. This screen now provides a **Send Batch** button to allow a toll-free number batch.

Search/Reserve

Older versions of 8MS had two screens for searching and reserving numbers: **Search SMS** and **Reserve**. These screens were replaced several years back with the combined **Search/Reserve** screen but the old screens were never removed since some users were allowed to search but not reserve numbers. In this release the **Search SMS** and **Reserve** screens have been removed. If a company has users that should not have access to the reserve section of the **Search/Reserve** screen, a new User Type checkbox: *Search Only* has been added. If this checkbox is set for a user, the **Search/Reserve** screen will not have the **Reserve** or **Batch Reserve** buttons. The conversion process that is run when upgrading to Release 7.2 will ensure that this checkbox is set appropriately based on current User Type values.

The *Reservation Data* section of the **Search/Reserve** provides a *RespOrg* drop-down list. The selected item in this drop-down indicates the Resp Org under which the numbers will be reserved. There are two new Company/User preferences that allow that list to be manipulated.

- **ReserveResporgList** is a comma separated list of Resp Orgs to be displayed in the drop-down. The string *All* is a shorthand for every Resp Org available for this company.
- Setting **ReserveSelectInitialResporg** to 1 says to populate the screen with the User or Company specified default Resp Org selected. Setting this preference to 0 says do not populate the screen with a Resp Org selected.
The default Resp Org will be the one indicated in the preference **ReserveResporg**. If this preference is not set the selected Resp Org is the Company default Resp Org.

API Changes

SMS/800 introduced the *MRO* message to the MGI several years ago. This message allows a user to change the Resp Org of multiple toll-free numbers in a single message rather than having to send one message for each toll-free number. 8MS had implemented the API Calls *MultiChangeResporg* and *BatchMultiChangeResporg* at that time. The parameters for these calls match their predecessors, the *ChangeResporg* and *BatchChangeResporg* to aid API customers in transitioning to the more efficient *Multi* messages.

The *ChangeResporg* and *BatchChangeResporg* messages have been removed from the API documentation in this release. The API calls will be removed in some near future release. We strongly encourage all 8MS API customers to replace these calls with the equivalent and much faster *MultiChangeResporg* and *BatchMultiChangeResporg* messages.

800 For All

At the time of release 7.1, csf Corporation introduced a new web site called **8MS Toll Free Tools**. 8MS Toll Free Tools is a collection of free utilities available to Responsible Organizations (Resp Orgs), Vanity Toll Free Providers, and Telephone companies of all sizes for finding Spare and Transitional (upcoming Spare) toll-free numbers. At this time we are excited to introduce another new web site called **800ForAll**.

800ForAll can help grow your base of toll free customers. 800ForAll is an internet application aimed at allowing end-user consumers to easily search for an available (spare) toll free vanity

number. Consumers will visit 800ForAll.com and follow the easy four step process to search for a toll free number, reserve it, select their toll free carrier, and enter their contact information. By advertising as a toll free carrier on 800ForAll, qualified leads will be delivered to your sales team (with the toll free number already reserved). Only 800ForAll allows the end-user to perform non-positional searches for available toll free numbers in the national SMS/800. database. Once they find the perfect number(s) and select you as their carrier we will immediately reserve the number(s) for them, and make you the Resp Org for their toll free numbers. In parallel we will confirm their reservation of the toll free number, and deliver the contact (lead) information to your sales team.

Release 7.1

Release 7.1 of 8MS contains primarily performance improvements and bug fixes. It also releases the 8MS Toll Free Tools web site for searching for Spare Numbers and Numbers expected to go Spare soon. (Note - 8MS Toll Free Tools was later replaced by 800ForAll.) This release introduces a new screen that interfaced with the new site, allowing 8MS users to directly search for upcoming Spare.

8MS Toll Free Tools

csf Corporation is excited to announce the launching of a new web site: **8MS Toll Free Tools**. 8MS Tools is a collection of free utilities available to Responsible Organizations (Resp Orgs), Vanity Toll Free Providers, and Telephone companies of all sizes.

Tools introduced in this release include

- searching for toll-free numbers currently available
- searching for toll-free numbers that will be available in the near future
- finding all possible spelled words for any phone number

Both search tools feature an easy to use pattern matching interface. Users may search within a single NPA (e.g 800) or across multiple NPAs. If you are looking for a vanity number that contains the word "GOLF" you do not have to tediously enter 8**GOLF**, 8***GOLF**, 8****GOLF* and observe results. Simply enter "GOLF" and see what is available.

SMS/800 wild-card patterns (using * and &) are also supported and may be entered in the toll-free number field as well as standard alphabetic characters. You can also specify pattern matching at the beginning or end of the vanity number (e.g SPORT\$ specifies a number that ends with SPORT, ^SPA specifies a number that starts with SPA).

For the available in the future search feature, a date range may be provided that limits the search to numbers which will become spare within the specified date range.

Clicking on the returned results allows you to review a list of properly spelled words filtered through an online dictionary. A minimum word length may be applied to any search, eliminating numbers that spell words less than the specified length. Additionally, up to two digits may be added on to the number in an attempt to spell longer words.

Spare # Forecast

Spare # Forecast is a new screen that allows 8MS to interface with **8MS Toll Free Tools**, allowing 8MS users to search for numbers that will be coming spare in the near future. All search criteria described above are available from this screen. Initially the size of number lists that will be created will be limited to 2000. Please contact support if you need to build larger lists.

CPRGen

The CPRGen tool now allows blocking on OTHER branches.

Performance Improvements

Database and application performance improvements have been implemented across the system.

Frequently Asked Questions

To provide the best support possible, the 8MS Support Team maintains a FAQ (Frequently Asked Questions) document which is based on phone calls and email received from customers. The FAQ has been updated with the latest questions and problems posed by our users. The FAQ, along with the user guide, is available from the Documentation link on the login page of your 8MS platform.

Release 7.0

Release 7.0 of 8MS is intended as a transitional release in preparation for SMS NG, the next generation of SMS/800 service. (Note - SMS NG was later cancelled by SMS/800.) This release provides the groundwork for the new version of SMS/800. The changes in this release related to SMS NG are invisible to the users of 8MS.

Beyond the SMS NG work in 8MS 7, this release also contained a small number of enhancements.

Batch Screens

A new field, **Max Messages per Hour** has been added to all batch screens. This gives the user the ability to limit the flow of messages to SMS/800. The user may now specify, for the current batch only, how quickly the messages will be sent to SMS, allowing the user to restrict batches from exceeding the CPU limits established by SMS/800.

CPRGen

The CPRGen tool has had a new option, **ReduceToOther**, added. If **ReduceToOther** is set to YES, all geographic routing nodes in the CPR will be examined to see if the routing logic on any branch exactly matches the routing logic on the OTHER branch. If so, the branch is removed. If the final result on a node is to remove all but the OTHER branch, then the node is removed (effectively moving the routing logic on the OTHER branch to the node above). This can

significantly reduce the size of complex CPRs.

Customer Invoices

Customers Invoices may now be viewed online. If you would like to have access to this feature, please contact us via the customer support line 732-356-6999 and we will enable this screen for you.

Search/Reserve

In 8MS 6, a new feature, **Reserve/Activate**, was added. If the **Activate** checkbox was checked on the **Search/Reserve** screen, any numbers that had been successfully reserved would automatically be activated. This was done by the user selecting a source number and date/time, or a template, at the time of the reserve. When the reserve completed, a **Batch Copy Record** would be started.

8MS 7 enhances this ability. A new checkbox, **Use Defaults** has been added to the **Search/Reserve** screen. This checkbox is used in conjunction with the **Activate** checkbox. The **Reserve/Activate** pop-up now allows a user to specify a default source number or template ahead of time. If both the **Activate** and **Use Defaults** checkboxes are both selected, when the reserve completes, the **Batch Copy Record** will use the default source.

Usage Counts

A new **User** field has been added to the **Usage Counts** screen, allowing the screen to show all counts affected by a single user.

Performance Improvements

Performance improvements have been implemented across the system.

Improvements have been made to processing of unsolicited messages, to reduce the possibility of flooding SMS/800 and to prevent degrading performance on 8MS when an offline SCP comes back online.

Release 6.0

Release 6.0 of 8MS contains a number of enhancements.

Bulletins

A global notification mechanism has been put into place to notify all 8MS customers of any 8MS or SMS/800 problems. This mechanism uses the existing 8MS **Bulletins** screen, accessible from the **Tools** menu. The check for new bulletins is now performed more frequently to alert all users of newly created bulletins.

A second notification mechanism is also in place. A system parameter may point to an html page

at some web site. This message will be shown in the center of the "Welcome to 8MS" page which is shown when a user logs in.

CAD Management

The number of lines for a termination may now be set via a pop-up brought up by selecting the **Terminations** button. Default values may be defined via the **Default Terminations** screen which is accessible from the **System Activity** menu.

A Number History button has been added to the Select and Schedule **Toll Free Number** fields.

EditPlan

The *SixDigit* label builder now allows you to view data by NPA or by LATA.

The LATA label builder now allows you to view data as a list of *LATAs*, by NPA or by State.

Number Lists

Performance on the Number Lists drop-down list has been improved by limiting the list to the most recently used number lists and adding a "Show All" icon button. The number of items shown is tunable via Company/User settings. *MyNumberLists* defines number lists you would always like to see; these will appear at the top of the list (just like *MyTemplates* does for templates).

RecentNumberListCount defines the amount of number lists you would like to see without having to select the "Show All" button (just like *RecentTemplateCount* does for templates).

Search/Reserve

Reserved numbers may now be immediately activated. A source template or toll free number may be assigned to the reserve. When the reserve completes, a *CopyRecord* batch is automatically run on those numbers that were successfully reserved.

A performance improvement has been made on wildcard search/reserve. The maximum possible results for a wildcard is now calculated and the *Count* field is modified if the user has provided a count that is greater than the possible number of results. (As an example, 800123456* has a maximum possible return of 10 numbers. If a user specifies a count of 100, this will be modified to 10 to speed up the response.)

Template Info

Number lists may now be created from this screen.

TestCall

A new feature for testing toll free numbers is now in the beta stage. This feature will allow users to automatically dial one or more toll free numbers, view the result of the call, and listen to the actual recorded call. Interested customers are encouraged to contact 8MS support for more details.

Geographic Info

A new screen has been added to provide geographic information. Queries may be done on a particular state, LATA, NPA, or NPA-NXX. All associated state, LATA, NPA and NPA-NXX data will be shown.

Usage Counts

The **Transaction Counts** screen has been replaced by a more comprehensive **Usage Counts** screen, which is available via the **System Activity** menu.

Least Cost Routing

A new feature for generating Call Processing Records (*CPRs*) based on rate tables and traffic usage data is now in the beta stage. Using the originating NPANXX of calls in the traffic data, this feature chooses the least cost Carrier to carry the call. If the resulting CPR exceeds SMS/800 limits (e.g. the number of paths in a CPR), the CPR is re-architected using Area Code, NXX, Lata and 6-Digit nodes to fit it into SMS/800. If this is unsuccessful, alternate Carriers are chosen for traffic which has the least impact on cost. Interested customers are encouraged to contact 8MS support for more details.

Miscellaneous

The Password screen has been moved from the login screen menu to the **System Admin** menu. This screen will not be available to all users. **Private** and **Dedicated** systems should review all data in the **User Types** screen and determine what users should have the ability to change their password.

The "Show All" button for the template drop-down list on all screens has been replaced by an icon. The "Show All" icon for templates and numbers lists is identical except for color; the templates button is blue while the number lists button is red.

Number History is now accessible via an icon if the text of the number is not a hyperlink.

Release 5.0

Release 5.0 of 8MS contains a number of enhancements.

CAD Management

Support for the new SMS "High Priority Update" feature has been added. A checkbox has been added to **CAD Management**, as well as the **Copy Record** and **Disconnect** screens.

Number Lists

Add a way to merge two lists.

Add a way to subtract one list from another.

Add a way to produce the intersection of two lists.

Search Local

Provide access to the "spread-sheet friendly" format from both Search Local screens.

Search Local Record: add a "Not" option for the Area of Service search.

Search Local Record: add a "Latest Date" option. Currently, if a toll free number has multiple records, they are all chosen. In Release 5, the *Latest Date* checkbox causes only the one record with the latest date to be displayed

Search/Reserve

The *last active* date of numbers will be captured, displayed, and stored. **Search Local #** will be enhanced to allow queries based on last active date.

A means to specify the names of the success/failure number lists will be added.

Templates

Implement "single-record" templates. Currently, a copy of the template is made for each customer record. This results in slower processing, and extra CAD and CPR data in the database. This change will implement a pointer in the record to the associated template.

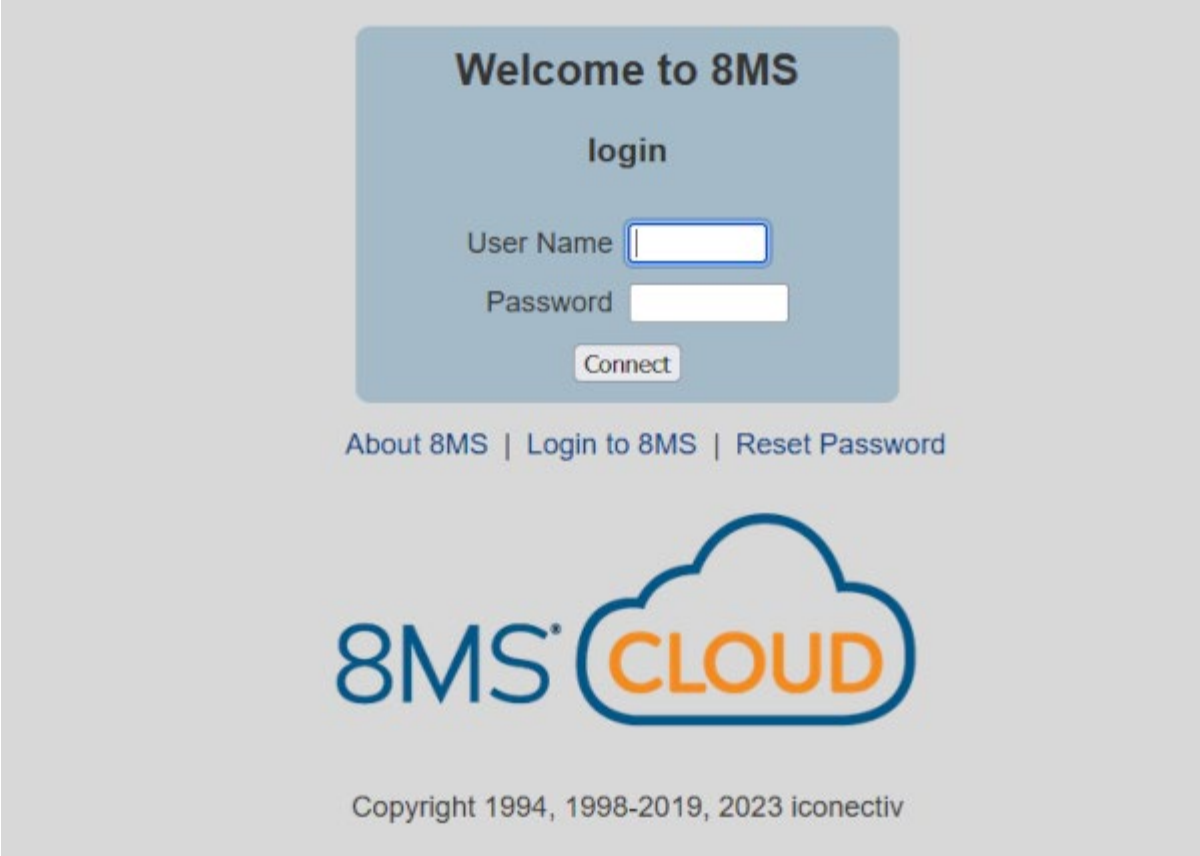
Currently, only ACTIVE records are associated with templates. In Release 5, any record can have an associated template.

Miscellaneous

A user permission will be added to control whether or not Send Batch buttons appear.

mon8ms will be enhanced to catch "stuck batches."

When first accessing the 8MS web interface, you are greeted with the Login screen, as shown below.

The image shows the 8MS Cloud login interface. At the top, a blue box contains the text "Welcome to 8MS" and "login". Below this, there are input fields for "User Name" and "Password", followed by a "Connect" button. Underneath the login box, there are three links: "About 8MS", "Login to 8MS", and "Reset Password". At the bottom, the 8MS Cloud logo is displayed, with "8MS" in blue and "CLOUD" in orange inside a blue cloud shape. Below the logo, the copyright text "Copyright 1994, 1998-2019, 2023 iconectiv" is visible.

The main area of the screen contains the actual login portion. Enter your **User Name** and **Password** and select the **Connect** button to log in.

Below the login portion are 3 links, each of which is discussed below.

Below the links is an optional pre-login message area. This area is generally intended for alerting users of out-of-the-ordinary conditions and will not always show a message.

Reset Password

Clicking on the **Reset Password** link brings you to a screen that allows the your password to be reset.

Reset 8MS Password

Please enter your User Name and Email ID.

User Name

Email ID

[Reset Password](#)

Enter your **User Name** and **Email ID** and select the **Reset Password** button. If the **User Name** exists in the system and the **Email ID** entered is associated with this **User Name** within 8MS then the password will be reset and an email will be sent to the specified email id. On a successful rest, the following message will be displayed.

Your password reset request has been processed.

Your new password has been emailed to you. You should change your password after successfully logging in.

For security purposes, in order to have permission to use the **Reset Password** screen, you must have permission to access the **Change Password** screen and you must have a valid email id associated with your **User Name** within the 8MS system.

If you do not have access to the **Change Password** screen or the entered **Email ID** does not match the one associated with your **User Name** within 8MS, your reset request will fail and the following message will be shown.

Your password reset request failed.

Confirm that your User Name and Email ID were entered correctly. The Email ID you enter must be the one associated with your User Name within the 8MS System.

If your request continues to fail, please contact the 8MS Help Desk.

After your password has been received, select the **Login to 8MS** link to return to the **Login** screen and enter your **User Name** and new **Password**.



It is highly recommended that you reset your password again after successfully logging in to 8MS.

About 8MS

Clicking on the **About 8MS** link shows what version of 8MS is currently running.

Login to 8MS

Clicking on the **Login to 8MS** link brings you back to the Login screen, allowing you to log into the system. This is used when viewing the **About 8MS** or **Reset Password** screens.

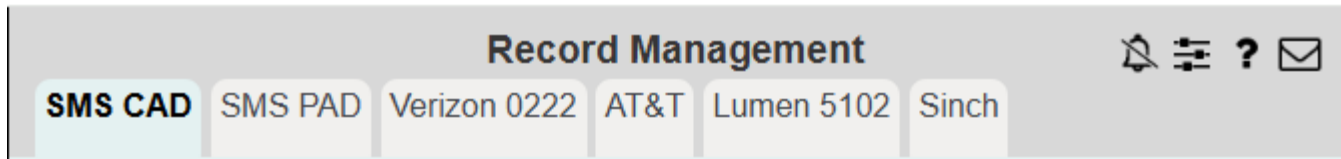
The **Number Administration** section contains all the functions for provisioning toll-free numbers on SMS/800. The following tasks are included in the **Number Administration** section:

Record Management	Create new Toll-Free Number records and modify existing Pending records.
CPR Management	View Toll-Free Number CPRs and delete local CPRs or modify the expiration date of local CPRs.
Change RespOrg	Change the Resp Org of one or more Toll-Free Numbers.
ROC Submit Request	Submit a Resp Org Change request via the ROC service.
ROC Management	Approve or deny a Resp Org Change request or delete numbers from a Resp Org Change request via the ROC service.
Copy Record	Easily copy an existing Toll-Free Number record, 8MS Routing Set or SMS Template to multiple Toll-Free Numbers.
Delete Local	Delete local Toll-Free Number records from 8MS.
Delete from SMS	Delete Pending Toll-Free Number records from SMS/800.
Disconnect	Disconnect Toll-Free Number records from SMS/800.
Edit Plan	Editing Call Processing Records (CPR).
Number History	View the history of a Toll-Free Number, including number state changes and Resp Org conversions.
Number Lists	Create new Number Lists and merge, compare and delete existing Number Lists.
Number Management	Update the contact information and notes of Reserved Toll-Free Numbers and re-reserve Transitional Toll-Free Numbers.
Query	Query the status of Toll-Free Number records on SMS/800.
Retrieve	Retrieve Toll-Free Numbers from SMS/800.
Search Local CarExp	View a snapshot of Toll-Free Number Carrier Express records based on flexible filtering options.
Search Local Numbers	View a snapshot of Toll-Free Numbers based on flexible filtering options.
Search Local Records	View a snapshot of Toll-Free Number records based on flexible filtering options.
Search/Reserve	Search for Spare Toll-Free Numbers on SMS/800 and reserve Spare numbers.
Spare	Spare disconnected Toll-Free Numbers.
Spare # Forecast	Search for Toll-Free Numbers that will be coming spare soon.
Transfer	Modify the date/time of a Pending Toll-Free Number record.
Trouble Number Query	Get contact information for a Toll-Free Number or Resp Org.
Undo Record Change	Provides an easy way to restore the last old record of multiple Toll-Free Numbers, particularly when the old records are not the same.

Number reservations, activations, disconnects, Resp Org changes, etc., are accomplished via screens in Number Administration. The result of a single-number SMS/800 operation will be displayed in the bottom section of the associated 8MS screen. This area is called the *response frame*. Results of every 8MS operation are also stored in the 8MS **Activity Log**. The Activity Log screen is in the **System Activity** menu section.

This screen allows you to view and update customer activation records for SMS/800 and all supported carriers. Customer activation records are used by SMS/800 and the carriers to implement the routing for a toll-free number.

To access **Record Management**, select the **Record Mgmt** link located in the **Number Admin** section of the menu. After accessing this screen, it is necessary to specify whether you will be working with an SMS/800 CAD record, SMS/800 PAD record or a carrier activation record. This is done by selecting the appropriate tab. (For more information on SMS/800 and carrier tab behavior, see [SMS/800 and Carrier Tabs](#).) Below is a screen shot of a typical set of tabs for **Record Management**.



To view documentation for each of the tabs see the sections indicated below.

- [Record Management: SMS CAD](#)
- [Record Management: SMS PAD](#)
- [Record Management: AT&T](#)
- [Record Management: Lumen-5102](#)
- [Record Management: Verizon 0222](#)
- [Record Management: Sinch](#)

This screen allows you to view and update the Customer Administrative Data (CAD) portion of an SMS/800 customer record. Customer records are used by SMS/800 to implement the routing for a toll-free number. In 8MS, this screen is also used to select complex routing (i.e., CPR/LAD information) that will be associated with an SMS/800 record. (For more information on how complex routing is handled in 8MS, see [CPR Management](#).)

To access the **SMS/800 CAD** tab of **Record Management**, select the **Record Mgmt** link located in the **Number Admin** section of the menu and then select the **SMS CAD** tab.

The screen is divided into three main areas:

- a top frame for pre-populating the CAD information from an existing customer record, and for specifying the toll-free number and effective date/time for the record to be created
- a middle frame that contains a summary of important information related to the currently displayed toll-free number
- a scrollable lower area containing the following sections:
 - administrative number information
 - the service area selection
 - the directory information area

Select/Schedule

The top section of the **SMS/800 CAD** screen appears as follows:

The screenshot shows the top section of the SMS/800 CAD screen. It is divided into two main columns: 'Select' and 'Schedule'.
 In the 'Select' column, there are four fields: 'SMS Template' (dropdown), '8MS Routing Set' (dropdown), 'Toll Free Number' (text field with a green arrow icon), and 'Date/Time' (dropdown). Each of the first three fields has a green checkmark icon to its right.
 In the 'Schedule' column, there are two fields: 'Toll Free Number' (text field with a green arrow icon) and 'Date/Time' (text field). The 'Toll Free Number' field has a green 'H' icon to its right. Below these fields is a checkbox labeled 'High Priority'.
 At the bottom of the form are four buttons: 'Send', 'Send Batch', 'View', and 'Refresh'.

At any point you have the option of populating the CAD from some existing record. The record may be selected either by choosing an SMS Template from the **SMS Template** list, an 8MS Routing Set from the **8MS Routing Set** list, or by entering a toll-free number using the **Toll Free Number** field. These are the fields located in the left-hand **Select** column. Alternatively, an item need not be selected, and the CAD information can be entered "from scratch."

If a toll-free number or SMS Template is selected as the source, the Date/Time list will automatically be populated with all records for that number or SMS Template. A record will be automatically selected and the data associated with that record will be displayed in the scrollable lower area. The record selected is chosen in the following order: ACTIVE, SENDING, most recent PENDING, or most recent OLD.



When populating the CAD data by entering the toll-free number, hit the **TAB** key after typing in the number.

Status Summary

The middle section of the **SMS/800 CAD** screen appears as follows:

RespOrg: ART19 Number Status: Working (11/11/11) Schedule Status: Active	Approval: NR Active 8MS Routing Set/SMS Template: 000000463 Schedule 8MS Routing Set/SMS Template: 000000463

Field	Description
RespOrg	The RespOrg owning this toll-free number.
Number Status	Shows the status of the toll-free number. Possible values include <i>Reserved</i> , <i>Assigned</i> , <i>Working</i> , and <i>Disconnect</i> .
Schedule Status	Shows the status of the currently selected record for this toll-free number. Possible values include <i>Pending</i> , <i>Sending</i> , <i>Active</i> , <i>Old</i> , <i>Invalid</i> , <i>Disconnect</i> , <i>Must Check</i> , <i>Failed</i> and <i>Hold</i> .
Approval	Shows the approval indicator of the currently selected record for this toll-free number. Possible values include <i>NA</i> (not applicable (approval is irrelevant due to customer record status, i.e., SAVED,INVALID,HOLD, or approvals do not apply to transaction)) <i>OK</i> all required approvals received by SMS <i>AW</i> SMS is awaiting at least one approval <i>DN</i> at least one affected carrier denied the approval request <i>NR</i> approvals are not required for this record <i>RJ</i> record is rejected due to effective date of NOW
Active 8MS Routing Set/SMS Template	Shows the 8MS Routing Set or SMS Template of the <i>Active</i> record for this toll-free number. If the <i>Active</i> record is a CAD record then an 8MS Routing Set will be shown; if the <i>Active</i> record is a PAD record then an SMS Template will be shown.
Schedule 8MS Routing Set/SMS Template	Shows the 8MS Routing Set or SMS Template of the currently selected record for this toll-free number. If the selected record is a CAD record then an 8MS Routing Set will be shown; if the selected record is a PAD record then an SMS Template will be shown.

CAD

As mentioned above, the CAD information is divided into three sections. The first contains number information, and appears as follows:

Number Information ●InterLATA Carrier ● IntraLATA Carrier ● Order Number ● Complex Record ● or enter new plan name [Edit Plan](#)Notes ● Due Date ● RAO ● Customer ● TelCo ● Contact Name ● Gerry FinkelEnd Intercept Date InterLATA POTS ● ☐POTS Termination ● SF Number ● [Termination Lines](#)Hold ● ☐Bill to Number ● 0000000000Agent ● IC/EC Billing ● Contact Phone ● 732-356-6999Referral Option ☐

For a description of each of these fields, see [Number Information](#).



The "dots" provided for the area heading and for the individual fields, serve as indicators of which information will be sent. They give you the ability to send only a subset of fields. A **green** dot indicates that the field will be sent. A **red** dot indicates that the field will NOT be sent. To change the color of the dot for a field just click on the dot. The dot provided for the headings serve as a toggle for all the fields in that heading. If you click a heading's green dot, it will turn all the dots for the fields to red. If you click a heading's red dot, it will turn all the dots for the fields to green. If you have a mixture of red and green dots for the fields, the heading's dot will be yellow.

The second section contains Service Area information, depicted in the following:

Service Area ●

Network ☒ US ☐ XA ☐ XB ☐ XC

☐ AM ☐ BA ☐ BS ☐ BX ☐ CN ☐ CR ☐ EU

☐ FL ☐ GT ☐ NX ☐ PC ☐ SH ☐ SN ☐ UT ☐ UW

State

Area Code

LATA

Labels

The Service Area defines the region(s) from which a toll-free number will receive calls. You have the option to define the Service Area by Network, State, LATA or Area Code. For a detailed description of each of these fields, see [Service Area](#).



To unselect a Network option of **US**, **XA**, **XB**, or **XC**, use the **None** button.

The final section contains the **Directory Assistance** information. These fields are located at the bottom of the scrollable region as depicted in the following:

Directory Information ●

Directory Assistance

Type ● Normal ▾ Update ● ☐

Listing

Type ● Blocked ▾

Address ● 8MS TEST #

Names ● CGI RESERVE LIST

For a detailed description of each of these fields, see [Directory Assistance](#).

Once the desired CAD information has been specified, and (optionally) a CPR selected, the target customer record information is entered. This is done using the **Toll Free Number** and **Date/Time** fields in the right-hand **Schedule** column at the top of the screen.



If a toll-free number was selected above, it will automatically be placed in the **Schedule Toll Free Number** field. You may leave it unchanged to send a new record for the selected number, or change it to a different number. This allows you to select the CAD information for one number and send it for another (i.e., do a copy from one number to another within the **SMS/800 CAD** screen).

In the **Date/Time** field, enter the effective date and time on which the customer record should become active. The format of this field is MM/DD/YY HH:MMa/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted. The time is also optional. If a date is entered without a time, then SMS/800 will schedule the activation sometime on the requested date. The keyword **NOW** can also be used to activate the record immediately.

Next to the **Date/Time** field is the **High Priority** checkbox. This checkbox provides access to the SMS/800 *High Priority Update* feature. Selecting this option will tell SMS to place this customer record at the front of the SCP queue. Only a small number of these updates can be done each day. After a high priority change is sent, check the [Activity Log](#) to see how many such updates remain for the current day.

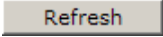
Select the button in the non-scrollable area at the top of the screen. A message will appear in the *response frame* (the area below the scrollable CAD information) indicating the status of the request.

Batch Change

This function allows you to change the routing of more than one toll-free number. The routing, service area, and directory information will be sent for the specified date/time for the given set of numbers.

Fill in the CAD information fields as discussed above, and enter a **Scheduled Date/Time** as previously described. However, instead of entering a toll-free number and hitting the button, leave the toll-free number field blank and click the button. The Batch Popup will appear. See [Batches](#) in the [Common Features](#) section for

details on the Batch Popup.

It is possible that the toll-free number or 8MS Routing Set you are currently viewing has been modified by another user or by the system. Select the  button to force the screen to repopulate all data for the currently selected toll-free number or 8MS Routing Set.

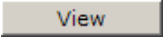
Number History

The **Toll Free Number** field under both the **Select** and **Schedule** sections of the top frame can provide a history of the number entered into the field. Clicking on the  image to the right of the field will produce a popup containing the change history of the selected number. For more information, see [Number History](#).

SCP Status

Between the **Date/Time** label and field on the top frame you may see the image . Clicking on this image will produce a popup containing the latest SCP status information for this particular toll-free number's record. For more information, see [SCP Status](#).

Toll Free Number/8MS Routing Set Report

A pdf report of a toll-free number or 8MS Routing Set may be generated. To see this report for the currently selected toll-free number or 8MS Routing Set select the  button. For a description of the report and its associated popup, see [Toll Free Number/8MS Routing Set Report](#).

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Record Management Preferences](#) for details on customizing this screen.

The Number Information portion of the **Record Management: SMS CAD** screen contains basic routing and administrative information. This portion of the **Record Management: SMS CAD** screen appears as follows:

Number Information ●

InterLATA Carrier ●	InterLATA POTS ● ☐
IntraLATA Carrier ●	POTS Termination ●
Order Number ●	SF Number ●
Complex Record ● or enter new plan name	Edit Plan
Notes ●	Termination Lines
Due Date ●	Hold ● ☐
RAO ● 000	Bill to Number ● 0000000000
Customer ●	Agent ●
TelCo ●	IC/EC Billing ●
Contact Name ● Gerry Finkel	Contact Phone ● 732-356-6999
End Intercept Date	Referral Option ☐

The Number Information portion of the **Record Management: SMS PAD** screen contains a subset of the fields on the Number Information portion of the SMS/800 CAD screen (routing data for a PAD record is stored in the SMS Template at which the record points). This portion of the **Record Management: SMS PAD** screen appears as follows:

Number Information ●

Order Number ●	SF Number ●
Notes ●	# Lines ● 9999
Due Date ●	Hold ● ☐
RAO ● 000	Bill to Number ● 0000000000
Customer ●	Agent ●
TelCo ●	IC/EC Billing ●
Contact Name ● Gerry Finkel	Contact Phone ● 732-356-6999
End Intercept Date	Referral Option ☐

The Routing Information portion of the **SMS Template Management** screen contains a subset of the fields on the Number Information portion of the SMS/800 CAD screen. This portion of the **SMS Template Management** screen appears as follows:

Routing Information ●

InterLATA Carrier ●	Approval:	Contact Name ● Gerry Finkel
IntraLATA Carrier ●	Schedule Status:	Contact Phone ● 732-356-6999
Complex Record ● or enter new plan name	Edit Plan	
Notes ●		Resp Org ART19
Description ●		# Lines ● 9999

The table below describes each of the fields:

Field	Description
InterLATA Carrier	The numeric CIC code of the primary InterLATA carrier, sent in the SMS/800 iec field.
IntraLATA Carrier	The numeric CIC code of the primary IntraLATA carrier, sent in the SMS/800 iac field.
Order Number	The Service Order Number. Must be from 4-13 bytes, where the first character is alphabetic, the second through twelfth characters are alphanumeric, and the thirteenth character is alphabetic.
Complex Record	The name of the Routing Plan that contains the complex routing for this record. This list will contain various routing plans depending on the source record selected • Toll-Free Number: all Official and Local CPRs for this toll-free number plus all Local SMS Template CPRs • 8MS Routing Set: the CPR for this 8MS Routing Set plus all Local SMS Template CPRs • SMS Template: all Official CPRs for this SMS Template plus all Local SMS Template CPRs For more information on creating complex routing, see CPR Management.
Notes	Commentary to be sent in the SMS/800 note field. Can be up to 151 characters.
Due Date	The Due Date. Format is MM/DD/YY.
RAO	The Revenue Accounting Office. Must be 3 bytes, decimal numerals.
Customer	The On-Line Access Customer. Must be 5 alphanumeric characters.
Telco	The company that sold SMS access. Must be 4 alphanumeric characters.
Contact Name	The name of the contact person. Maximum of 30 characters.
Contact Phone	The Contact Phone Number. Must be 10 decimal numerals.
End Intercept Date	The End Intercept Date. Format is MM/DD/YY. An End Intercept Date is used for disconnect records. Specifying a value for intercept date will cause a disconnect rather than a change to be sent. The preferred way to disconnect a number in 8MS is to use the Disconnect screen.
Referral Option	The Referral Option used for disconnect records.
POTS Termination	A POTS number to which SMS/800 will direct calls.
InterLATA POTS	Allows InterLATA POTS to be specified. If a value is specified in the POTS Termination field, and the interLATA POTS is not checked, both the POTS and Toll Free Dialed Number values will be sent as TELs. If InterLATA POTS is checked, only the given POTS number will be sent.
SF Number	The Supplemental Form Number. Must be 1-6 alphanumeric characters. Required if Service Order Number is not specified.
Termination Lines	The popup associated with this button allows you to define the number of lines for each termination used in the CAD and CPR for this toll free number. See Termination Lines for details.
# Lines	This field (only shown on the SMS/800 PAD screen) allows you to override the

number of lines for the toll-free number, defined in the SMS Template at which this record points.

- Hold** Selecting this checkbox will create a customer record with a status of HOLD. When its schedule time arrives, the record will not go active.
- Bill to Number** The Bill To, or Alternate Billing Number. Must be 10 alphanumeric characters.
- Agent** The On-Line Agent for Customer. Must be 5 alphanumeric characters.
- IC/EC Billing** The IC/EC Billing Indicator. Must be 3 alphabetic characters for an Inter-exchange Carrier, 4 alphabetic characters for an Exchange Carrier.
- Resp Org** Used only by the **SMS Template Management** screen, this field defines the Resp Org for the SMS Template to be created.

The Service Area defines the regions from which a toll-free number can receive calls. The Service Area may be associated directly with a toll-free number via the **Record Management: SMS CAD** screen or by pointing at an SMS Template via the **Record Management: SMS PAD** screen, in which case the Service Area is defined in the **Template Management** screen. The Service Area section of the **Record Management: SMS CAD** screen appears as follows:

Service Area ●

Network ☒ US ☐ XA ☐ XB ☐ XC

☐ AM ☐ BA ☐ BS ☐ BX ☐ CN ☐ CR ☐ EU

☐ FL ☐ GT ☐ NX ☐ PC ☐ SH ☐ SN ☐ UT ☐ UW

State

Area Code

LATA

Labels

SMS Template may not have an service area of that includes any of the CCS networks. The Service Area section of the **SMS Template Management** screen appears as follows:

Service Area ●

Network ☒ US ☐ XA ☐ XB ☐ XC

State

Area Code

LATA

Labels

Below is a description of the fields:

Field	Description
Network	(See network codes below.)
US	United States
XA	United States and Canada
XB	United States and Caribbean
XC	United States, Canada and Caribbean

AM	Ameritech
BA	Bell Atlantic
BS	Bell South
BX	Bell Canada
CN	Canada
CR	Caribbean
EU	Telus
FL	Frontier
GT	GTE
NX	Nynex
PC	Pacific Bell
SH	
SN	South New England Telephone
UT	United Telephone
UW	US West

State This field allows you to define an area of service based state, using a comma-separated list of two-letter state abbreviations.

Area Code This field allows you to define an area of service NPA, using a comma-separated-list of three digit area codes.

LATA This field allows you to define an area of service LATA, using a comma-separated list of three digit LATA codes.

Labels This field allows you to use a comma-separated list of Area of Service labels. These label names must be previously defined in SMS/800. SMS does not provide a means by which 8MS can create Area of Service labels.



To unselect a Network option of **US**, **XA**, **XB**, or **XC**, you must select the **None** button.

Below is the Directory Assistance area of the SMS/800 CAD screen:

Directory Information ●

Directory Assistance

Type ● Normal ▼ Update ● ☐

Listing

Type ● Blocked ▼

Address ● 8MS TEST #

Names ● CGI RESERVE LIST

The following table describes each of the fields:

Field	Description
Directory Assistance Type	Choose one of the following: Normal , Government , or Frequently Called .
Update	Check this box to indicate the Directory Assistance provider requested the change.
Listing Type	Choose one of the following: Blocked , Published , Non-Published .
Listing Address	Enter the address of the company to be used in Directory Assistance.
Names	Enter one or more listing names. At least one name is required.

This screen allows you to view and update the Pointer Administrative Data (PAD) portion of an SMS/800 record. Pointer records are used by SMS/800 to point at an SMS Template. The SMS Template contains the routing to be used by this toll-free number.

To access the **SMS/800 PAD** tab of **Record Management**, select the **Record Mgmt** link located in the **Number Admin** section of the menu and then select the **SMS PAD** tab.

The screen is divided into three main areas:

- a top frame for pre-populating the PAD information from an existing customer record, and for specifying the toll-free number and effective date/time for the record to be created
- a middle frame that contains a summary of important information related to the currently displayed toll-free number
- a scrollable lower area containing the following sections:
 - administrative number information
 - the SMS Template to be used for routing.

Select/Schedule

The top section of the **SMS/800 PAD** screen appears as follows:

At any point you have the option of populating the PAD from some existing record. The record may be selected either by choosing an 8MS Routing Set from the **8MS Routing Set** list or by entering a toll-free number using the **Toll Free Number** field. These are the fields located in the left-hand **Select** column. Alternatively, an item need not be selected, and the PAD information can be entered "from scratch."

If a toll-free number is selected as the source, the Date/Time list will automatically be populated with all records for that number. A record will be automatically selected and the data associated with that record will be displayed in the scrollable lower area. The record selected is chosen in the following order: ACTIVE, SENDING, most recent PENDING, or most recent OLD.



When populating the PAD data by entering the toll-free number, hit the **TAB** key after typing in the number.

Status Summary

The middle section of the **SMS/800 PAD** screen appears as follows:

RespOrg: ART19 Number Status: Working (11/11/11) Schedule Status: Active	Approval: NR Active 8MS Routing Set/SMS Template: 000000463 Schedule 8MS Routing Set/SMS Template: 000000463

Field	Description												
RespOrg	The RespOrg owning this toll-free number.												
Number Status	Shows the status of the toll-free number. Possible values include <i>Reserved</i> , <i>Assigned</i> , <i>Working</i> , and <i>Disconnect</i> .												
Schedule Status	Shows the status of the currently selected record for this toll-free number. Possible values include <i>Pending</i> , <i>Sending</i> , <i>Active</i> , <i>Old</i> , <i>Invalid</i> , <i>Disconnect</i> , <i>Must Check</i> , <i>Failed</i> and <i>Hold</i> .												
Approval	Shows the approval indicator of the currently selected record for this toll-free number. Possible values include <table border="0" style="margin-left: 20px;"> <tr> <td style="vertical-align: top;"><i>NA</i></td><td>(not applicable (approval is irrelevant due to customer record status, i.e., SAVED, INVALID, HOLD, or approvals do not apply to transaction))</td></tr> <tr> <td style="vertical-align: top;"><i>OK</i></td><td>all required approvals received by SMS</td></tr> <tr> <td style="vertical-align: top;"><i>AW</i></td><td>SMS is awaiting at least one approval</td></tr> <tr> <td style="vertical-align: top;"><i>DN</i></td><td>at least one affected carrier denied the approval request</td></tr> <tr> <td style="vertical-align: top;"><i>NR</i></td><td>approvals are not required for this record</td></tr> <tr> <td style="vertical-align: top;"><i>RJ</i></td><td>record is rejected due to effective date of NOW</td></tr> </table>	<i>NA</i>	(not applicable (approval is irrelevant due to customer record status, i.e., SAVED, INVALID, HOLD, or approvals do not apply to transaction))	<i>OK</i>	all required approvals received by SMS	<i>AW</i>	SMS is awaiting at least one approval	<i>DN</i>	at least one affected carrier denied the approval request	<i>NR</i>	approvals are not required for this record	<i>RJ</i>	record is rejected due to effective date of NOW
<i>NA</i>	(not applicable (approval is irrelevant due to customer record status, i.e., SAVED, INVALID, HOLD, or approvals do not apply to transaction))												
<i>OK</i>	all required approvals received by SMS												
<i>AW</i>	SMS is awaiting at least one approval												
<i>DN</i>	at least one affected carrier denied the approval request												
<i>NR</i>	approvals are not required for this record												
<i>RJ</i>	record is rejected due to effective date of NOW												
Active 8MS Routing Set/SMS Template	Shows the 8MS Routing Set or SMS Template of the <i>Active</i> record for this toll-free number. If the <i>Active</i> record is a CAD record then an 8MS Routing Set will be shown; if the <i>Active</i> record is a PAD record then an SMS Template will be shown.												
Schedule 8MS Routing Set/SMS Template	Shows the 8MS Routing Set or SMS Template of the currently selected record for this toll-free number. If the selected record is a CAD record then an 8MS Routing Set will be shown; if the selected record is a PAD record then an SMS Template will be shown.												

PAD

As mentioned above, the PAD information is divided into two sections. The first contains number information, and appears as follows:

Number Information ●

Order Number ●		SF Number ●	
Notes ●		# Lines ●	9999
Due Date ●		Hold ●	☐
RAO ●	000	Bill to Number ●	0000000000
Customer ●		Agent ●	
TelCo ●		IC/EC Billing ●	
Contact Name ●	Gerry Finkel	Contact Phone ●	732-356-6999
End Intercept Date		Referral Option	☐

For a description of each of these fields, see [Number Information](#).



The "dots" provided for the area heading and for the individual fields, serve as indicators of which information will be sent. They give you the ability to send only a subset of fields. A **green** dot indicates that the field will be sent. A **red** dot indicates that the field will NOT be sent. To change the color of the dot for a field just click on the dot. The dot provided for the headings serve as a toggle for all the fields in that heading. If you click a heading's green dot, it will turn all the dots for the fields to red. If you click a heading's red dot, it will turn all the dots for the fields to green. If you have a mixture of red and green dots for the fields, the heading's dot will be yellow.

The second section contains the SMS Template to use for call routing, depicted in the following:

SMS Template Information

SMS Template 

This list is populated with all SMS Templates available for this SMS entity which have been downloaded onto 8MS. If the desired SMS Template is not in the list (i.e. it is not in the 8MS database), it may be downloaded by going to the [Retrieve SMS Template](#) screen. New SMS Templates may be created by going to the [SMS Template Management](#) screen.



If a toll-free number was selected above and the selected record is a PAD record, the SMS Template field will automatically populate with the record's **SMS Template** value. If the record is a CAD record, this field will not be populated.

Once the desired PAD information has been specified, the target customer record information is entered. This is done using the **Toll Free Number** and **Date/Time** fields in the right-hand **Schedule** column at the top of the screen.

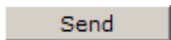
If a toll-free number was selected above, it will



automatically be placed in the **Schedule Toll Free Number** field. You may leave it unchanged to send a new record for the selected number, or change it to a different number. This allows you to select the PAD information for one number and send it for another (i.e., do a copy from one number to another within the **SMS/800 PAD** screen).

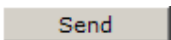
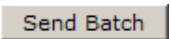
In the **Date/Time** field, enter the effective date and time on which the customer record should become active. The format of this field is MM/DD/YY HH:MMa/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted. The time is also optional. If a date is entered without a time, then SMS/800 will schedule the activation sometime on the requested date. The keyword **NOW** can also be used to activate the record immediately.

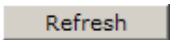
Next to the **Date/Time** field is the **High Priority** checkbox. This checkbox provides access to the SMS/800 *High Priority Update* feature. Selecting this option will tell SMS to place this customer record at the front of the SCP queue. Only a small number of these updates can be done each day. After a high priority change is sent, check the **Activity Log** to see how many such updates remain for the current day.

Select the  button in the non-scrollable area at the top of the screen. A message will appear in the *response frame* (the area below the scrollable PAD information) indicating the status of the request.

Batch Change

This function allows you to change the routing of more than one toll-free number. The routing, service area, and directory information will be sent for the specified date/time for the given set of numbers.

Fill in the PAD information fields as discussed above, and enter a **Scheduled Date/Time** as previously described. However, instead of entering a toll-free number and hitting the  button, leave the toll-free number field blank and click the  button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

It is possible that the toll-free number or 8MS Routing Set you are currently viewing has been modified by another user or by the system. Select the  button to force the screen to repopulate all data for the currently selected toll-free number or 8MS Routing Set.

Number History

The **Toll Free Number** field under both the **Select** and **Schedule** sections of the top frame can provide a history of the number entered into the field. Clicking on the  image to the right of the field will produce a popup containing the change history of the selected number. For more information, see **Number History**.

SCP Status

Between the **Date/Time** label and field on the top frame you may see the image . Clicking on this image will produce a popup containing the latest SCP status information for this particular toll-free number's record. For more information, see **SCP Status**.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **Record Management Preferences** for details on customizing this screen.

This screen allows you to create a new activation record for a number to be loaded onto the *AT&T* network or change data on a number.

To access the **AT&T** tab of **Record Management**, select the **Record Mgmt** link located in the **Number Admin** section of the menu and then select the **AT&T** tab.

The screen is divided into two main areas:

- a top frame for specifying the toll-free number for the record to be created
- A lower area containing the following sections:
 - *Order and Contact* information
 - *Profile and Account Type*
 - common *Activate* and *Change* administrative and routing information
 - specific *Activate* and *Change* routing information

Schedule

The top section of the **AT&T** screen appears as follows:

This section is used for sending a single toll-free number or a batch of numbers to the AT&T carrier. Sending records is discussed below.

Order and Contact Information

The first section of the lower area contains AT&T order, contact information and Activate-specific data. It appears as follows.

The *Order and Contact Information* section of this screen allows the user to enter their Client Order # and contact information associated with this order. The table below describes the fields for this section.

Field	Description
Contact Name	The person to contact if AT&T has questions about this record activation. Its maximum size is 30 characters.

If the *ContactName* User/Company Preference is set then this field will be pre-populated.

Contact Phone The phone number of the contact person. If the *ContactPhone* User/Company Preference is set then this field will be pre-populated.

Client Order # The AT&T order associated with the number(s) being activated/changed. Its maximum size is 21 characters.

Resp Org The controlling Resp Org of this Toll-Free Number.

Payphone Indicator Indicates whether payphone calls are blocked to this Toll-Free Number.

Order Type The type of service being configured. Currently only a single service type is available, so this may not be changed *PTF360*.



Note that the row containing **Resp Org** and **Payphone Indicator** will show when the *Activate* tab is selected and will be hidden when the *Change* tab is selected.

Profile and Account Type

The next section provides the ability to use an **AT&T Profile** to replace the set of common and activation data.

Profile

Field	Description
Profile	The profile to use in your <i>Activate</i> or <i>Change</i> action.

Common Administrative and Routing Data

Below the *Profile and Account Type* is the administrative and routing data common between *Activate* and *Change* actions. This section appears as shown below.

Enterprise ID	815	Account Type	foo
MCN	356998	LSO	530574
APN	978820	RAO	641
Routing Number	7323026464	Group Size	17

Field	Description
Enterprise ID	The Ericsson Account Number for this Toll-Free Number.

Account Type The account type is associated with a profile and may not be modified. When provisioning Toll-Free Numbers, if a profile is not selected, the account type is not provisioned.

MCN The AT&T Master Customer Number for this Toll-Free Number.

LSO The Local Serving Office for this Toll-Free Number.

APN The Action Point Number for this Toll-Free Number.

RAO The Revenue Accounting Office for this Toll-Free Number.

Routing Number The routing number for this Toll-Free Number.

Group Size The group size for this Toll-Free Number.

Tab Actions

Below the *Common Administrative and Routing Data* section are the tabs that define the actions that may be performed on a number in AT&T. Selecting a tab defines the action that you will perform and shows the fields that may be set for that action.

- *Activate* allows you to activate a new toll-free number.
- *Change* allows you to modify data for an active toll-free number.

Activate

Use the *Activate* tab when activating a new number that has not yet been loaded onto the AT&T network. The Activate portion of this screen appears as shown below.

FQDN		
Distribution Group		
Billing Type		TF Service Type
Intelligent IVR	☐	Hybrid ☐
Call Recording	☐	Caller Verify ☐
Small Business	☐	Skyvera ☐
Edge	☐	

The table below describes the fields for this tab.

Field	Description
FQDN	The fully-qualified domain name for this Toll-Free Number.
Distribution Group	The distribution group for this Toll-Free Number.
 Only one of FQDN and Distribution Group may be populated.	



Billing Type The billing type is related to the **RAO**. Options include

- OCN
- OSL
- Standard

TF Service Type The toll-free service type for this Toll-Free Number. Options include

- DTF
- IPTF

Intelligent IVR Indicates whether this Toll-Free Number subscribes to the Intelligent IVR service.

Hybrid This should only be set for custom orders at AT&T's direction.

Call Recording Indicates whether this Toll-Free Number subscribes to the Call Recording service.

Caller Verify Indicates whether this Toll-Free Number subscribes to the Caller Verification service.

Small Business Indicates if this Toll-Free Number is a Small Business Markets Toll-Free Offer number.

Skyvera A special feature offer that allows for connection to various custom cloud solutions.

Edge Indicates whether this Toll-Free Number is part of the Ericsson Edge System.

Change

Use the *Change* tab when modifying information on a number that has already been loaded onto the AT&T network.

Change Type

Resp Org

Payphone Indicator ☐ Y ☐ N

Distribution Group

The table below describes the fields for this tab.

Field	Description

Change Type The set of fields being modified for this change action. Each option indicates which field(s) should be changed at AT&T. Possible values include

- Distribution Group
- Resp Org
- Payphone Indicator
- Resp Org/Distribution Group
- Payphone Indicator/Distribution Group
- Resp Org/Payphone Indicator
- Distribution Group/Resp Org/Payphone Indicator



All change fields are initially set to read-only. Selecting the *Change Type* causes the appropriate fields to be editable or non-editable.

If the *Change Type* is modified after entering values in one or more fields, any fields not in the specified change type are cleared out.

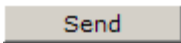
Resp Org The controlling Resp Org for this Toll-Free Number.

Distribution Group The distribution group for this Toll-Free Number.

Payphone Indicator Indicates whether payphone calls are blocked to this Toll-Free Number.

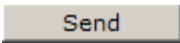
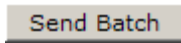
Sending an Activate/Change

Once the desired information has been specified, the target toll-free number is entered. This is done by entering your number in the **Toll Free Number** field at the top of the screen.

Select the  button in the non-scrollable area at the top of the screen. A message will appear in the *response frame* (the bottom area of the screen) indicating the status of the request.

Batch Change

This function allows you to activate, change or move multiple numbers on the AT&T network.

Fill in the appropriate fields as discussed above. However, instead of entering a toll-free number and hitting the  button, leave the toll-free number field blank and click the  button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

See **Batches** in the **Common Features** section for additional common details on this Batch Popup variation.

Number History

The **Toll Free Number** field under both the **Select** and **Schedule** sections of the top frame can provide a history of the number entered into the field. Clicking on the  image to the right of the field will produce a popup containing the change history of the selected number. For more information, see [Number History](#).

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Record Management Preferences](#) for details on customizing this screen.

With the introduction of the new Carrier Express AT&T interface in release 27.0, the **AT&T Profile** was introduced. A profile defines a set of common values used to activate, modify or disconnect Toll-Free Numbers. This speeds up provisioning of Toll-Free Numbers in AT&T and reduces the chance of introducing errors.

Profile values are determined by the customer, in conjunction with AT&T. However, profiles are only created by AT&T or 8MS support; they cannot be created by 8MS users. Once created, new profiles will appear in **Profile** drop-down lists on the **Record Management: AT&T** and **Disconnect: AT&T** screens.

Field	Description
Profile Name	The profile name provides a unique identifier for a profile.
Account Type	The account type is determined by AT&T when creating the profile.
Enterprise ID	The Ericsson Account Number for a Toll-Free Number.
MCN	The AT&T Master Customer Number for a Toll-Free Number.
LSO	The Local Serving Office for a Toll-Free Number.
APN	The Action Point Number for a Toll-Free Number.
RAO	The Revenue Accounting Office for a Toll-Free Number.
Routing Number	The routing number for a Toll-Free Number.
Group Size	The group size for a Toll-Free Number.
FQDN	The fully-qualified domain name for a Toll-Free Number.
Distribution Group	The distribution group for a Toll-Free Number.
	 Only one of FQDN and Distribution Group may be populated.
Billing Type	The billing type is related to the RAO . Options include • OCN • OSL • Standard
TF Service Type	The toll-free service type for a Toll-Free Number. Options include • DTF

- IPTF

Payphone Blocking	Indicates whether payphone calls are blocked to a Toll-Free Number.
Edge	Indicates whether a Toll-Free Number is part of the Ericsson Edge System.
Intelligent IVR	Indicates whether a Toll-Free Number subscribes to the Intelligent IVR service.
Hybrid	This should only be set for custom orders at AT&T's direction.
Call Recording	Indicates whether a Toll-Free Number subscribes to the Call Recording service.
Caller Verify	Indicates whether a Toll-Free Number subscribes to the Caller Verification service.
Small Business	Indicates if a Toll-Free Number is a Small Business Markets Toll-Free Offer number.
Skyvera	A special feature offer that allows for connection to various custom cloud solutions.

This screen allows you to activate a new toll-free number, modify data for an active toll-free number, and move an active toll-free number on the *Lumen-5102* network.

To access the **Lumen-5102** tab of **Record Management**, select the **Record Mgmt** link located in the **Number Admin** section of the menu and then select the **Lumen-5102** tab.

The screen is divided into two main areas:

- a top frame for specifying the toll-free number for the record to be created
- A lower area containing the following sections:
 - number information
 - general routing information
 - shared termination data or unique termination data, depending on the termination type selected

Schedule

The top section of the **Lumen-5102** screen appears as follows:

This section is used for sending a single toll-free number or a batch of numbers to the Lumen-5102 carrier. Sending records is discussed below.

Number Information

As mentioned above, the lower area of this screen is divided into four sections. The first section contains Lumen-5102 number information and appears as follows.

LUMEN®

Number Information

Customer Number

Termination Type ☒ Shared ☐ Unique

[Update Customer Configuration](#)

When a **Customer Number** is selected, the customer description appears to the right of the drop-down list as shown below.

Number Information

Customer Number Valid Customer Number

Termination Type ☒ Shared ☐ Unique

[Update Customer Configuration](#)

The table below describes the fields for this section.

Field	Description

Customer Number The Lumen-5102 customer number that identifies this customer.

Termination Type Indicates whether this is a *Shared* or *Unique* termination type.

Update Customer Configuration 8MS stores a snapshot of your Lumen data and refreshes this data on a scheduled basis. In the event that your data is not up-to-date, selecting the **Update Customer Configuration** button refreshes your Lumen data.

General

Below the *Number Information* section is the *General* section which defines basic service settings.

General

Billing Account

Billing Telephone Number

Service Area ☐ US ☐ XA ☐ XB ☐ XC

Field	Description
Billing Account	The Lumen billing account. This field is available for <i>dedicated</i> and <i>switched</i> service.
Billing Telephone Number	The billing telephone number. This must be a valid POTS number and is available for <i>dedicated</i> and <i>switched</i> service.
Service Area	Defines the regions from which a toll-free number will receive calls. The options available for this field are a subset of the SMS CAD Service Area . For a description of these fields, see Service Area .



Drop-down lists are populated based on selections made higher-up on the screen. Some lists will be empty if there are no choices available. For example, selecting an item from the **Customer Number** list will populate the **Billing Account** list. Depending on the **Termination Type** selected, other lists will also be populated. For example, the **Route Name** list will be populated if **Termination Type** is *Shared*.

Shared Termination Data

If the **Termination Type** is set to *Shared*, the section following the *General* section is the *Shared Termination Data* section which contains shared termination fields.

Shared Termination Data

Route Name

The table below describes the fields for this section.

Field	Description
Route Name	The Route Name to be used to route this toll-free number.

Unique Termination Data

If the **Termination Type** is set to *Unique*, the section following the *General* section is the *Unique Termination Data* section which contains unique termination fields.

Unique Termination Data

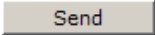
Primary	
Primary RTN Primary Trunk Group v	Primary Switch v Primary DNIS
Alternate	
Alternate RTN Alternate Trunk Group v	Alternate Switch v Alternate DNIS
Secondary Alternate	
Secondary Alternate Trunk Group v	Secondary Alternate Switch v Secondary Alternate DNIS

The table below describes the fields for this section.

Field	Description
Primary RTN	The ring to number (Translated WTN). This must be a valid POTS number.
Primary Switch	The switch used for routing calls for this toll-free number.
Primary Trunk Group	The trunk group associated with the specified Primary Switch .
Primary DNIS	The DNIS digits associated with the specified Primary Switch which are passed on during the call.
Alternate RTN	The alternate ring to number (Translated WTN). This must be a valid POTS number.
Alternate Switch	An alternate switch used for routing calls for this toll-free number.
Alternate Trunk Group	The trunk group associated with the specified Alternate Switch .
Alternate DNIS	The DNIS digits associated with the specified Alternate Switch which are passed on during the call.
Secondary Alternate Switch	An additional alternate switch used for routing calls for this toll-free number.
Secondary Alternate Trunk Group	The trunk group associated with the specified Secondary Alternate Switch .
Secondary Alternate DNIS	The DNIS digits associated with the specified Secondary Alternate Switch which are passed on during the call.

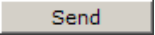
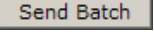
Sending an Activate/Change

Once the desired information has been specified, the target toll-free number is entered. This is done by entering your number in the **Toll Free Number** field at the top of the screen.

Select the  button in the non-scrollable area at the top of the screen. A message will appear in the *response frame* (the bottom area of the screen) indicating the status of the request.

Batch Change

This function allows you to activate, change or move multiple numbers on the Lumen-5102 network.

Fill in the appropriate fields as discussed above. However, instead of entering a toll-free number and hitting the  button, leave the toll-free number field blank and click the  button. The Batch Popup will appear. See [Batches](#) in the [Common Features](#) section for details on the Batch Popup.

Number History

The **Toll Free Number** field under both the **Select** and **Schedule** sections of the top frame can provide a history of the number entered into the field. Clicking on the  image to the right of the field will produce a popup containing the change history of the selected number. For more information, see [Number History](#).

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Record Management Preferences](#) for details on customizing this screen.

This screen allows you to update the most recent customer activation record for *Sinch* or create a new activation record.

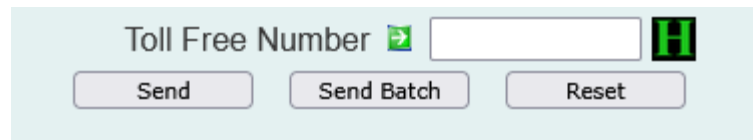
To access the **Sinch** tab of **Record Management**, select the **Record Mgmt** link located in the **Number Admin** section of the menu and then select the **Sinch** tab.

The screen is divided into two main areas:

- a top frame for specifying the toll-free number for the record to be created
- a lower area containing administrative and routing information.

Schedule

The top section of the **Sinch** screen appears as follows:



This section is used for sending a single toll-free number or a batch of numbers to the Sinch carrier. Sending records is discussed below.

Administrative and Routing Data

The administrative and routing information section is broken out by the **Activate** and **Change** actions, controlled by tabs.

At the top of this section is the **Customer Order Reference** field, used for tracking an order. This is available for both actions, while the remaining data are associated with the individual actions. It appears as shown below.

Customer Order Reference

Below this field are tabs splitting out the two actions available.

- *Activate* allows you to activate a new toll-free number.
- *Change* allows you to modify data for an active toll-free number.

Activate

Use the *Activate* tab when activating a new number that has not yet been loaded onto the Sinch network. The Activate portion of this screen appears as shown below.

[Activate](#) [Change](#)

Product Abbreviation

Billing Telephone Number

Service Type ☒ Dedicated ☐ Switched

DNIS

Routing Label

Terminating Number

The table below describes the fields for this tab.

Field	Description
Product Abbreviation	Currently, the only valid value for this field is <i>8XX</i> . This field is read-only and is shown because of the possibility of other values in the future.
Billing Telephone Number	A contact number associated with this toll-free number. If specified, this field must be 10 digits.
DNIS	The DNIS digits associated with this toll-free number. This field is only needed for a Service Type of <i>Dedicated</i> and is greyed-out when Service Type is set to <i>Switched</i> .
Routing Label	The Sinch routing label associated with this toll-free number. This field is only needed for a Service Type of <i>Dedicated</i> and is greyed-out when Service Type is set to <i>Switched</i> .
Terminating Number	The terminating number associated with this toll-free number. If specified, this field must be 10 digits. This field is only needed for a Service Type of <i>Switched</i> and is greyed-out when Service Type is set to <i>Dedicated</i>.

Change

Use the *Change* tab when modifying information on a number that has already been loaded onto the Sinch network.

Activate **Change**

Change Type

DNIS

Remove DNIS ☐

Routing Label

Terminating Number

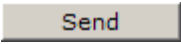
The table below describes the fields for this tab.

Field	Description
Change Type	The set of fields being modified for this change action. Each option indicates which field(s) should be changed at AT&T. Possible values include ○ DNIS ○ Remove DNIS ○ Routing Label ○ Terminating Number  All change fields are initially set to read-only. Selecting the <i>Change Type</i> causes the appropriate fields to be editable or non-editable. If the <i>Change Type</i> is modified after entering values in one or more fields, any fields not in the specified change type are cleared out.
DNIS	The DNIS digits associated with this toll-free number.
Remove DNIS	Selecting a Change Type of <i>Remove DNIS</i> makes the Remove DNIS radio button active. This button may not be unselected; it is only affected by selecting a Change Type
Routing Label	The Sinch routing label associated with this toll-free number.
Terminating Number	The terminating number associated with this toll-free number. If specified, this field must be 10 digits.

Sending an Activate/Change

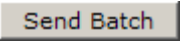
Once the desired information has been specified, the target toll-free number is entered. This is done by

entering your number in the **Toll Free Number** field at the top of the screen.

Select the  button in the non-scrollable area at the top of the screen. A message will appear in the *response frame* (the bottom area of the screen) indicating the status of the request.

Batch Change

This function allows you to activate, change or move multiple numbers on the Sinch network.

Fill in the appropriate fields as discussed above. However, instead of entering a toll-free number and hitting the  button, leave the toll-free number field blank and click the  button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

See **Batches** in the **Common Features** section for additional common details on this Batch Popup variation.

Number History

The **Toll Free Number** field under **Schedule** section of the top frame can provide a history of the number entered into the field. Clicking on the  image to the left of the field will produce a popup containing the change history of the selected number. For more information, see **Number History**.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **Record Management Preferences** for details on customizing this screen.

This screen allows you to view and update the most recent customer activation record for *Verizon 0222* or create a new activation record.

To access the **Verizon 0222** tab of **Record Management**, select the **Record Mgmt** link located in the **Number Admin** section of the menu and then select the **Verizon 0222** tab.

The screen is divided into two main areas:

- a top frame for pre-populating the carrier routing data from an existing customer record, and for specifying the toll-free number for the record to be created
- a lower area containing administrative number information.

Select/Schedule

The top section of the **Verizon 0222** screen appears as follows:

At any point you have the option of populating the screen from an existing record. The record may be selected by entering a toll-free number in the **Toll Free Number** field under the **Select** area on the left side of this frame. A toll-free number does not need to be selected; you may instead enter all the data yourself.



When populating a record by entering the toll-free number, hit the **TAB** key after typing in the number.

Carrier Routing Data

The carrier routing information section appears as follows:

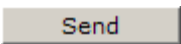
The *Number Information* section of this screen defines the data required to activate a number in Verizon's 0222 CIC. The table below describes the fields for this section.

Field	Description
Corp ID	The Verizon Corporate Identifier in which this number is to be activated.
Super Plan ID	The pre-defined Verizon Super Plan ID in which this number is to be activated.

Once the desired information has been specified, the target toll-free number is entered. This is done by entering your number in the **Toll Free Number** field on the right **Schedule** column at the top of the screen.

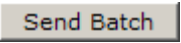


If a toll-free number was selected above, it will automatically be placed in the **Schedule Toll Free Number** field. You may leave it unchanged to send a new record for the selected number, or change it to a different number. This allows you to select the carrier routing data for one number and send it for another (i.e., do a copy from one number to another within the **Verizon 0222** screen).

Select the  button in the non-scrollable area at the top of the screen. A message will appear in the *response frame* (the area below the carrier routing data) indicating the status of the request.

Batch Change

This function allows you to change the routing of more than one toll-free number. The number information from will be sent for the given set of numbers.

Fill in the carrier routing fields as discussed above. However, instead of entering a toll-free number and hitting the  button, leave the toll-free number field blank and click the  button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

It is possible that the toll-free number you are currently viewing has been modified by another user or by the system. Select the  button to force the screen to repopulate all data for the currently selected toll-free number.

Number History

The **Toll Free Number** field under both the **Select** and **Schedule** sections of the top frame can provide a history of the number entered into the field. Clicking on the  image to the right of the field will produce a popup containing the change history of the selected number. For more information, see **Number History**.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **Record Management Preferences** for

details on customizing this screen.

This function allows you to view, create, edit, and delete complex routing associated with toll free numbers.

In SMS/800, complex routing is tightly coupled with customer records. In 8MS however, the association is somewhat looser. Complex routing records are associated with toll free numbers, but exist separate from customer records. They are given user-supplied names when they are created, before they are sent to SMS/800. Complex routing plans that have been created and named, but have not yet been sent to SMS/800 are called *Local Plans*. Local plans have names that begin with an alphabetic character.

At some point, a local plan is selected to be sent as part of a customer record to SMS/800 (using **Record Management**). Once accepted by SMS/800, a copy of the local plan is made with a new name, and it becomes an *Official Plan*. Official plans have names that begin with a numeric character (in fact, they are named by the effective date/time of the customer record with which they are associated; e.g., **12/15/01-10:00A**). Official plans cannot be changed by the user, nor can they be explicitly deleted. They may be deleted by 8MS only if/when the associated customer record is deleted.

8MS provides a graphical interface for editing routing plans. More on this below.

The **CPR Management** screen allows complex routing plans to be viewed and possibly changed. To access this screen, select the **CPR Management** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:

This screen is divided into two main areas. The top portion allows you to specify the toll free number for which to view plans. The lower portion is scrollable, and is where the routing plans are listed.

Enter the desired toll free number in the **Toll Free Number** field. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

Select the plan type to view: Official, Local or Both.

Select the **Get Plans** button to retrieve the existing routing plans for the toll free number specified. The plans for the toll-free number will be displayed in the lower frame as follows:

<u>Toll Free Number</u>	<u>Plan Name</u>	<u>Status</u>	<u>Expires</u>	<u>Size</u>
8007258016	 07/21/04-09:45A	Active		10704
8007258016	☐ special	Local	09/27/07	59
Delete Marked Plans				

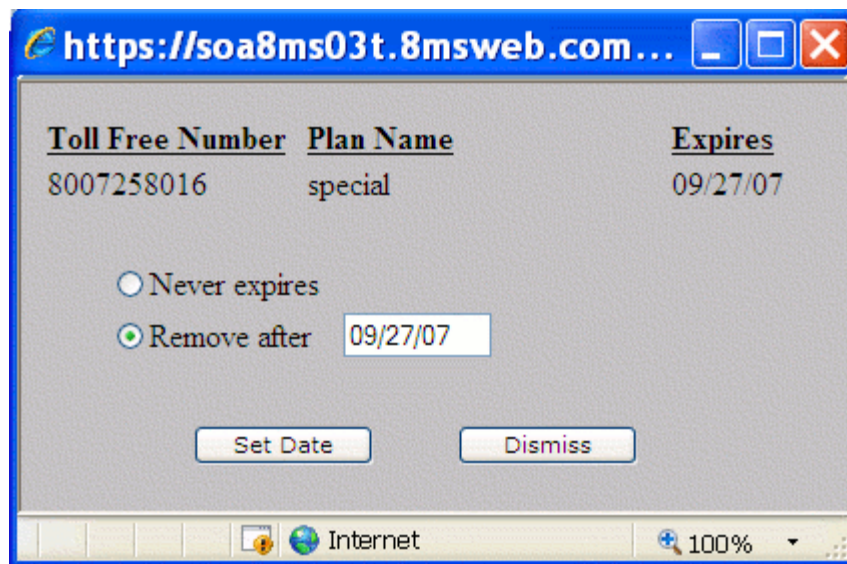
This example shows both an official and a local plan. The  icon indicates that the official plan cannot be deleted. To delete a local plan, select the appropriate checkbox, and hit the **Delete Marked Plans** button.

To bring up the graphical routing plan editor for an existing plan, click on its name. You can bring up the plan editor for either official or local plans. The difference is that you will not be able to overwrite an official plan. You can only save it as a new local plan.

If desired, use the **New Plan** button to create a new plan for the given toll free number. This will invoke the graphical editor with a blank routing plan.

For instructions on using the graphical editor, see [Editing Complex Routing](#).

Local routing plans may have an expiration date, specified at the time the plan was created. Such plans will have a button in the **Expires** column. In the example above, it is the **12/22/04** button. Clicking this button will present a popup allowing the expiration date to be changed:



You may either change the existing date, or select **Never expires** to keep the plan indefinitely. Click the **Set Date** button to save your change.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [CPR Management Preferences](#) for details on customizing this screen.

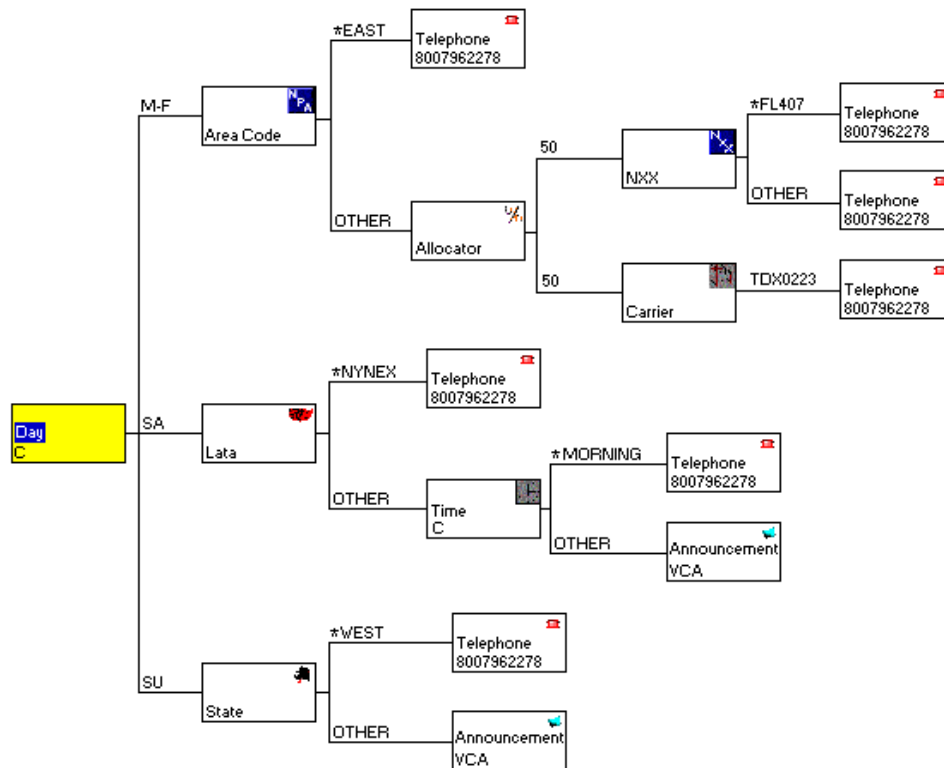
8MS stores the complex routing of a toll free number or SMS Template (what SMS/800 refers to as the CPR and LAD portions of a record) in a single data object, and supplies a graphical tool for creating and/or modifying such routing. Complex routing records (or CPRs) can either be *local* or *official*. For more information on these types of CPRs, please see [CPR Management](#) or [SMS Template CPR Management](#).

The tool for editing complex routing, called **EditPlan**, can be accessed from the [CPR Management](#), [Record Management: SMS CAD](#), [SMS Template CPR Management](#), [SMS Template Management](#) and [CPR Generator](#) screens.

The complex routing is presented as a *tree*, consisting of nodes and branches. Types of nodes include **Allocator**, **Announcement**, **Area Code**, **Carrier**, **Telephone**, **Ten Digit**, and **Time**. These nodes represent decision points in your routing plan. For example, an Area Code node allows you to direct the toll free number routing according to the area code of the originating call.

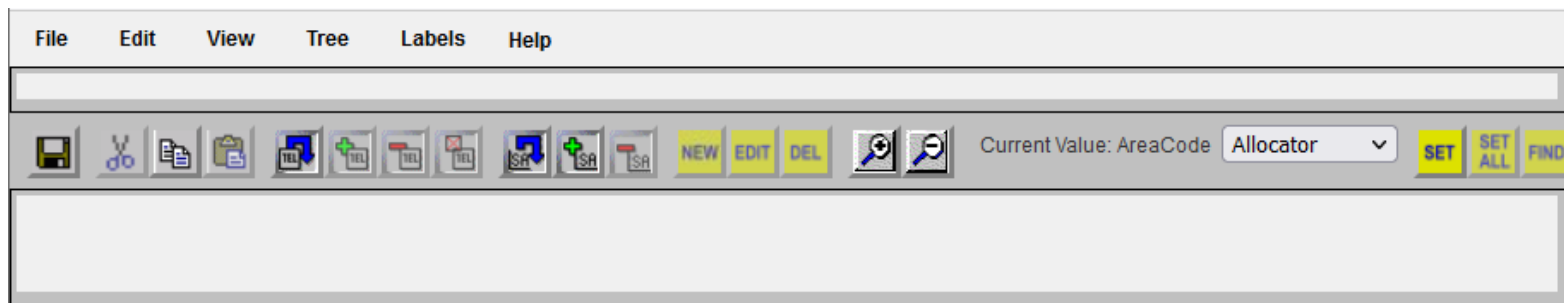
A *branch* is used to direct a routing plan to the next node. Branch *types* are dependent upon the node from which the branch originates. Branch *values* specify the conditions under which a call should follow that path. For example, an Area Code node could have three branches flowing from it: the first branch directs calls from the 609 and 856 area codes to one node, the second branch directs calls from the 973, 908 and 732 calls to another node, and the third branch directs calls from all other area codes to yet another node. A branch value can also be an SMS/800 *label*, that is, a user-defined name associated with one or more values of the appropriate type. For example, in the tree shown below, ***EAST** is an Area Code label, whose value consists of one or more Area Codes. If the call originated from any of the Area Codes in the ***EAST** label, the call is sent to the given termination. If the call originated from an Area Code not in the ***EAST** label, then the **OTHER** path will be taken, and the next decision point will be the **Allocator** node.

The following is an example of a routing plan:



Editor Controls

The following is a screenshot of the plan editor controls, followed by a description of the control sections.



Section	Purpose
Menubar	The first row of the controls provides a standard user interface menubar. The commands for the menubar are described below, in the Editor Operations section.
Command Mode	The second row of the controls allows for a keyboard-driven set of commands for operations in the menubar. Command Mode commands are described below, in the Editor Operations section. A detailed explanation of how to use command mode is described below, in the Command Mode section.
Toolbar	The left side of the third row provides a toolbar with shortcuts for operations in the menubar. The commands for the toolbar are described below, in the Editor Operations section.
Set/Set All/Find	To the right of the Toolbar on the third row are the Set/Set All/Find command buttons. These commands are described below, in the Editor Operations section.
Validation Feedback	The fourth row of the controls contains a text area for providing feedback to the user. This is used most often for show validation errors in the CPR, although it also shows information messages at appropriate times.

Editor Operations

The table below describes how to perform the various operations on a routing plan. The **Toolbar Icon** shows the icon that gives you quick access to a menubar operation.

Action	How to Perform	Toolbar Icon	Key Command
Create a New CPR	- Select New from the File menu. - This will throw away the current CPR (after confirming this with the user) and then create a new, empty CPR.		
Open a New Dialed Number CPR	- Select Open -> Open Dialed Number Plan... from the File menu. - This will provide a popup that will allow the user to open another routing plan for editing. The plan opened is based on toll free number and plan name.		<i>od</i>

Open a New SMS Template CPR

- Select **Open ->> Open SMS Template Plan...** from the **File** menu.
- This will provide a popup that will allow the user to open another routing plan for editing. The plan opened will be any of the local SMS Template plans.

ot

Save CPR Changes

- Select **Save** from the **File**  menu.
- This will save the plan back to the 8MS database. If this is a new plan or a read-only then the "Save As" menu will appear.

Save CPR Changes with a New Name

- Select **Save As -> Save As Dialed Number Plan...** or **Save As -> Save As SMS Template Plan...** from the **File** menu.
- This allows the user make a copy of a routing plan for backup purposes or if the user was editing an official (read-only) plan. If **Save As Dialed Number Plan...** is selected then the plan saved is a local plan associated with a particular toll free number. If **Save As SMS Template Plan...** is selected then the plan saved is a local SMS Template plan and is not associated with a particular SMS Template.

Exit the CPR Editor

- Select **Quit** from the **File**  menu.
- This will exit the plan editor.

q

to enter Command Mode. If in Command Mode, hitting this key allows the user to exit Command Mode. This is for Command Mode only.

Execute Command Mode command	When in Command Mode, hitting this key causes the entered command to be validated and, if valid, executed.	<i>Enter Key</i>
Show the Command Mode Help Dialog	When in Command Mode, this will show the Command Mode Help Dialog.	<i>?</i>

Add a Node	- From the Edit menu, select Node -> Add Node. - A new node can be added as the first node of a tree or to a branch.		<i>an</i>
Insert a Node	- From the Edit menu, select Node -> Insert Node. - A new node can be inserted in front of any existing node in a tree.		<i>in</i>
Set or Change a Node Type or Value	- Click on the node. The node will change from its icon form to its edit form. - Type directly into the node, or use the Current Value drop-down list in the upper right-hand corner, and hit the  button. - Changing the type of an existing node may clear all of its branch values.		
Splice a Node	- From the Edit menu, select Node -> Splice Node. - A single node may be cut out of the CPR, allowing the nodes below it to be attached to the node above it. - A node can only be spliced when there is a		<i>sn</i>

node above it and one or more nodes below it.

- Click on the node. Select **Node -> Splice Node** from the **Edit** menu. This will cut out the current node and shift it's children to below it's parent.
- For more detail, refer to the [Splicing a CPR](#) section below.

Delete a Node and all of its Branches

- Click on a node. Select **Node -> Delete Node** from the **Edit** menu. This will delete the node and all its children.
- To delete a node and store the deleted subtree in the Copy Buffer, see the [Cut a Subtree](#) command.



dn

Add a Branch

- Click on a node or a branch. Select **Branch -> Add Branch** from the **Edit** menu.
- Adding a new branch while on an existing branch will add it immediately below the current position.
- Adding a new branch while on a node will add a new branch below all existing branches of the node.



ab

Insert a Branch

- Click on a node or a branch. Select **Branch -> Insert Branch** from the **Edit** menu.
- Inserting a new branch while on an existing branch will add it immediately above the current position.
- Adding a new branch while on a node will add a new branch above all existing branches of the node.



ib

Modify a Branch

- Select the Branch Value to be changed and type the new value in the highlighted area.

Delete a Branch

- Select the branch to be deleted and select **Branch -> Delete Branch**.
- Deleting a branch deletes the whole sub-tree below the branch.
- To delete a branch and store the deleted subtree in the Copy Buffer, see the **Cut a Subtree** command.

*db***Cut a Subtree**

- Select the node or branch to be deleted and stored in the Copy Buffer. Now select **Cut** from the **Edit** menu.
- Cutting a node or branch deletes the whole sub-tree below that node or branch.

*cu***Copy a Subtree**

- Select the node or branch to be stored in the Copy Buffer. Now select **Copy** from the **Edit** menu.

*co***Paste a Subtree**

- To paste a subtree starting with a branch, select a node with no child nodes below it. Now select **Paste** from the **Edit** menu.
- To paste a subtree starting with a node, select a branch with no child nodes below it. Now select **Paste** from the **Edit** menu.

*p***Paste Labels**

- To paste labels currently stored in the Copy Buffer, select **Paste Labels** from

*pl*

the **Edit** menu.

It is possible to copy labels from another CPR and then add those labels to the CPR currently being edited.

See [The Copy Buffer](#) for details on managing the Copy Buffer.

View Copy Buffer

- To view the current Copy Buffer, select **View Copy Buffer** from the **Edit** menu.



vb

See [The Copy Buffer](#) for details on managing the Copy Buffer.

Create a New Label

- Select a branch that allows labels. Select **Labels -> Add Branch** from the **Edit** menu.
- The node-specific label builder popup will appear. Enter or select the values to be stored in the label and select the **Save** button. If the branch in the previous step had a label name entered then the new label will be created. If the branch in the previous step was blank then the **Save As** popup will appear. Enter the name of the label and select **Ok** on the **Save As** popup.
- Additional labels for this node type may be created while in the label builder. Enter or select the values to be stored in the new label and select the **Save As** button. These labels may now be entered on any branch of this node type.



nl

Modify (Edit) an Existing Label

- Select a branch that

el



allows labels and has a label entered on the branch. Select **Labels -> Edit Label** from the **Edit** menu.

- The node-specific label builder popup will appear with all values in this label selected. Make all your changes and select the **Save** button. If the branch in the previous step had a label name entered then the new label will be created. If the branch in the previous step was blank then the **Save As** popup will appear. Enter the name of the label and select **Ok** on the **Save As** popup.
- Additional labels for this node type may be created while in the label builder. Enter or select the values to be stored in the new label and select the **Save As** button. These labels may now be entered on any branch of this node type.

Delete Label

Select a branch containing the name of the label to be deleted. Select **Labels -> Delete Label** from the **Edit** menu.

The label will be deleted. Note that the branch value will turn red, indicating that the label on this branch is invalid (since it no longer exists).



dl

Navigating the CPR

- The 4 keyboard arrow keys allow the user to "walk" the CPR.
- Holding down any one arrow key allows the user to quickly move up, down, left or right.
 - Holding down the left arrow key will quickly move you to the root node.

*Up Arrow Key
Down Arrow Key
Left Arrow Key
Right Arrow Key*

- Holding down the right arrow key will quickly move focus down the first path (top child node/branch) until focus movement stops at the leaf/terminal node.
- Holding down the up arrow key will quickly move focus to the top sibling node/branch. When the top node/branch has been reached, focus will then jump down to the bottom node/branch.
- Holding down the down arrow key will quickly move focus to the bottom sibling node/branch. When the bottom node/branch has been reached, focus will then jump up to the top node/branch.

Depth-first traversal of the CPR	A depth-first traversal of a tree moves focus from any node/branch to the child (right) node/branch. When reaching a leaf/terminal node, focus backtracks to the parent's next branch and then continues in the same manner.	<i>Enter Key</i>
Go to Root Node	Move focus to the Root Node of this CPR	<i>gr</i>
Find Node/Branch	Find the next branch that matches the current branch	<i>f</i>

Change Node Display Mode	• Select Graphical from the View menu. • This toggles between <i>graphical display</i>, in which nodes are displayed as icons, and <i>standard display</i>, in which nodes are	<i>grmode</i>

displayed as text.

- Graphical mode is the default; standard is depicted above.
- Note: even in graphical mode, the current node will be displayed as editable text.

Change Tree Display Mode

- Select **Balanced** from the **View** menu.
- This toggles between two means of displaying the routing tree. *Balanced* mode is the default, and is the mode depicted above. *Non-balanced* mode displays the tree somewhat like Microsoft Windows Explorer displays folder trees.

balmode

Zoom In

- Select **Zoom In** from the **View** menu.
- This will increase the size of nodes in the editing window, making them easier to read.

zi

Zoom Out

- Select **Zoom Out** from the **View** menu.
- This will decrease the size of nodes in the editing window, allowing more of the tree to be visible at one time.

zo

Fit to Window

- Select **Fit to Window** from the **View** menu.
- This will determine the maximum node display size that allows the entire tree to be visible in the current window.

zf

Normal View

- Select **Normal View** from the **View** menu.
- This resets the node display size of its initial value.

zn

Collapse Tree	• Select Collapse Node from the Tree menu. • This will collapse the tree from the current node downwards, and replace the sub-tree with an expansion icon at the end of the path. • An expansion icon is a circle with the icon of the node type in the center of the circle. As an example, an NXX expansion icon would be 	<i>cn</i>
Expand One Level	• Select Expand One Level from the Tree menu. • This will expand the current node but will not expand any of the sub-tree.	 <i>xl</i>
Expand Node	• Select Expand Node from the Tree menu. • This will expand the current node and all sub-trees under the current node.	<i>xn</i>
Expand Tree	• Select Expand Tree from the Tree menu. • This will fully expand all collapsed node in the current tree.	<i>xt</i>
Highlight Path	Highlight the current node/branch and all nodes/branches to the right See the Highlighting CPR Paths section for details on this command.	<i>hp</i>
Unhighlight this Path (Highlight Path Off)	Turn off any highlighting on this node/branch and all nodes/branches to the right. See the Highlighting CPR Paths section for details on this command.	<i>hpo</i>
Unhighlight Tree (Highlight Tree Off)	Turn off any highlighting on	<i>hto</i>

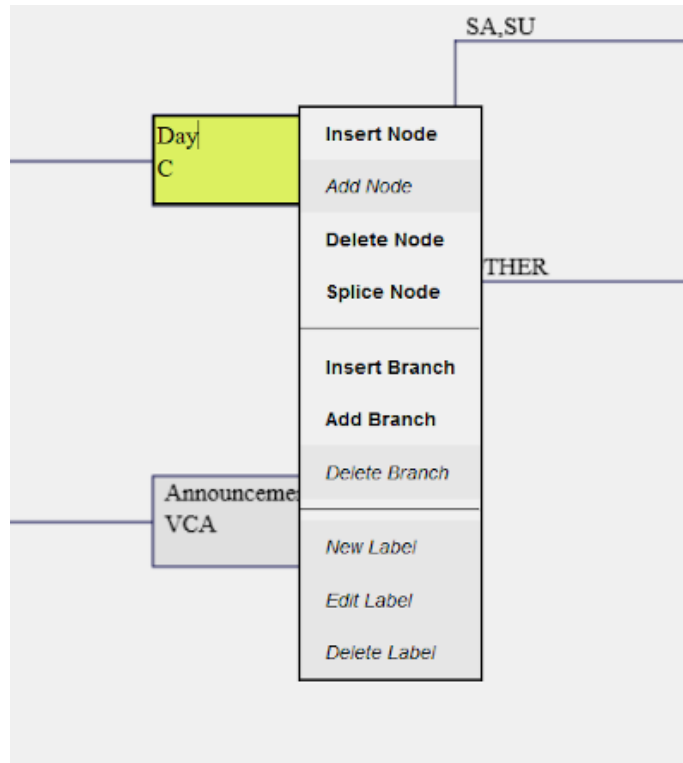
this CPR. See the **Highlighting CPR Paths** section for details on this command.

Create "Bulk" Labels	• Select Build Labels from the Label menu. • The Label Builder popup will appear. Type or paste the values to be stored in the label, select the Build button to split out and define your labels and then select the Import button to import the labels into your CPR. See the section on Label Builder, below, for details on using this popup.	
Remove Unused Labels	• Select Cleanup Labels from the Label menu. • This function allows all unused labels to be removed in one step.	<i>cl</i>
Remove Bad Label Values	• Select Cleanup Label Values from the Label menu. • This function allows all illegal label values to be removed in one step.	<i>clv</i>
View Labels	• Select View Labels from the Label menu. • The Labels Viewer popup will appear. ◦ If focus is not on a branch with a label, the popup will be empty. Enter any desired filters to limit what labels are shown and then select the Show button. To view all labels, select the Show button without specifying any filters. ◦ If focus is on a branch containing a	<i>vl</i>

label, that label's value will be shown.

- See the section [Labels Viewer Dialog](#) for more details.

In addition to the menubar and toolbar, a context-sensitive menu of node, branch and label options is also available in the work area of the editor (i.e. the area with nodes and branches). This menu is available by clicking right on the node or branch that has focus. This menu contains the most commonly used commands. An example of this menu is shown below, activated by a right click on the highlighted AreaCode node.



Editor Concepts and Functions

- **Saving Modifications:** The CPR editor is invoked from from the **Edit Plan** button on both the **Record Management: SMS CAD** screen and the **SMS Template Management** screen or by clicking on the name of a plan (after specifying a toll-free number) from the **CPR Management** screen. In all cases no changes are stored in the database until the user explicitly saves the CPR using either **Save** or **Save As**. CPRs can only be saved as local plans. As discussed in [CPR Management](#), you cannot change an official plan.

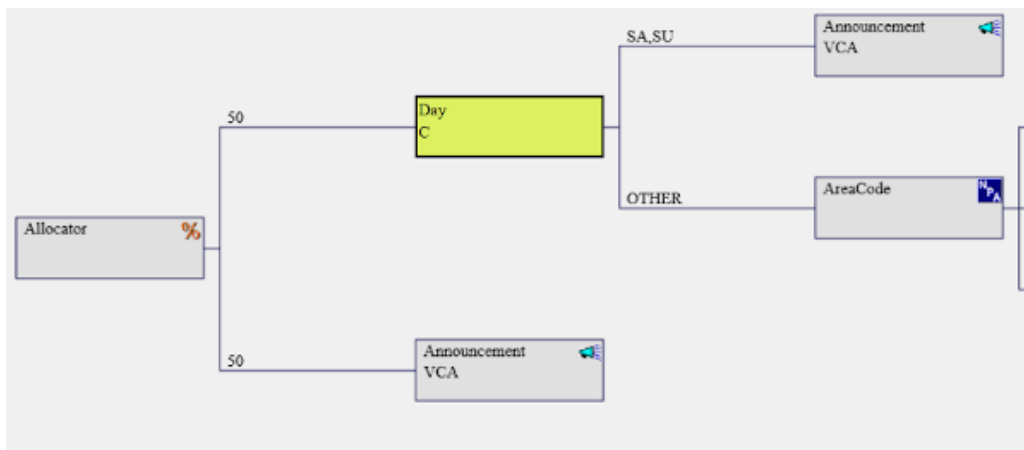
When a local plan is saved, you can specify an *expiration date*. The local plan will automatically be deleted on that date. The expiration date is specified on the **Save As** popup:

You can specify an expiration date, or select **Never expires** to keep the plan indefinitely.

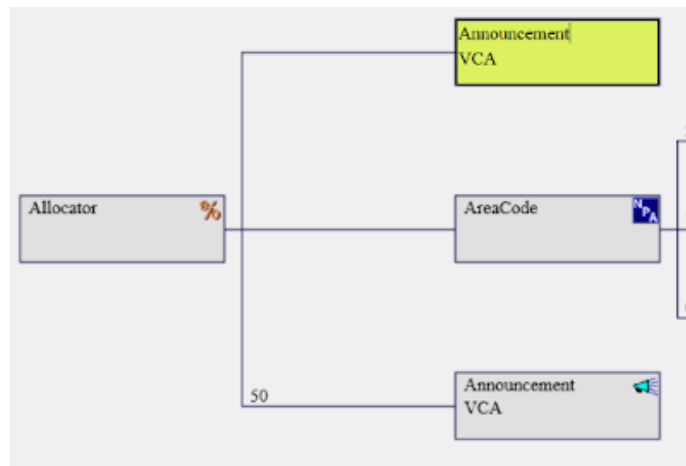
- Navigating in the Editor: At any given time, there is a concept of current editing *position*. This is either a node or a branch and is highlighted in yellow. Other nodes and branches can be selected by either pointing to a new position with the mouse, navigating with the arrow keys on the keyboard, or by using the **FIND** button to find the next occurrence of a branch label.
- The **Current Value** indicator in the upper right-hand corner always represents the highlighted branch value or node type. The drop down menu next to the current value contains a context-sensitive list of values valid for the currently selected branch or node. If a Label is the current value, then the indicator will also state how many times the label appears in the current CPR.
- The box to the left of the current value is an error message window. It contains context sensitive validation errors that relate to the current branch or node. Additionally, a branch or node that has errors will be highlighted in **RED**.
- The **SET ALL** button is used to change all occurrences of the current branch value (for the specific node type) to the value in the **Current Value** drop down.
- When an editing session starts (with either an add node or an add branch), the editor goes into an *auto-build* mode which allows the user to quickly build routing paths. During auto-build, the user hits the ENTER or RETURN key after adding each node and branch, and the next path in the tree is automatically added. Auto-Build mode continues until the user either hits the ESCAPE key, or hits ENTER or RETURN on blank branches until the editor has returned to the spot in the tree at which auto-build began.

Splicing a CPR

The **Splice Node** command works alongside **Add Node**, **Insert Node**, and **Delete Node**. Among these node edit commands, **Splice Node** is relatively new (introduced in 8MS release 16.0). Splicing a node removes that single node and shifts all its children to its parent. Prior to the addition of this tool, there was no way to delete a single node without deleting all of its children. It's use may not be obvious, so an example is provided here.



The focus node, a Day node, is child to an Allocator. The user wants to remove the Day node but keep the routing below it intact.



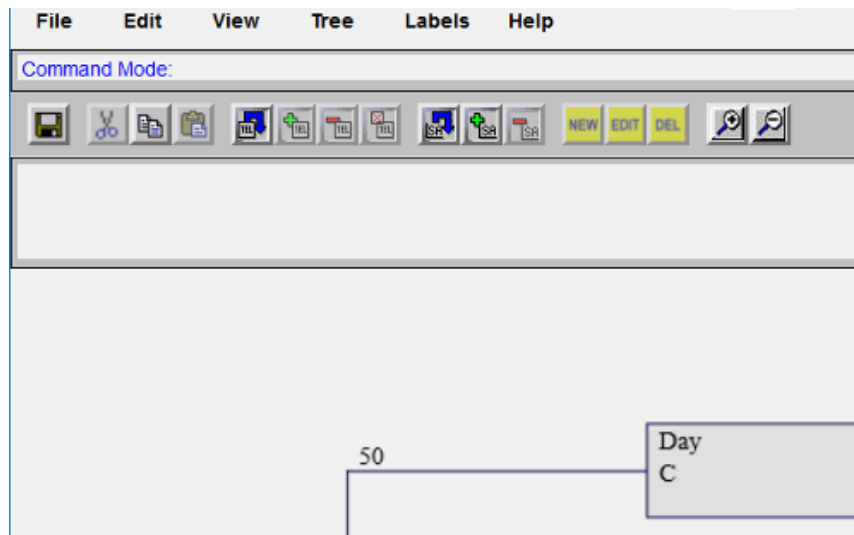
After splicing the Day node, the node and the branch leading in to it are removed and the Day node's two child branches now come directly from the Allocator. These two branches are positioned exactly where the Day node was located. Note that the two branches that were reparented now have blank values because the Day branch values "SA,SU" and "OTHER" have no meaning to an Allocator node. The user will need to provide meaningful values on these branches. The lower "50" branch of the Allocator remains where it was and its branch value is not modified.

Another case where the **Splice Node** command is useful is to chop out the root node and move its child into the root position. The root node may only be spliced if it has a single child. Splicing a root node with multiple children would leave multiple root nodes, something that is not allowed.

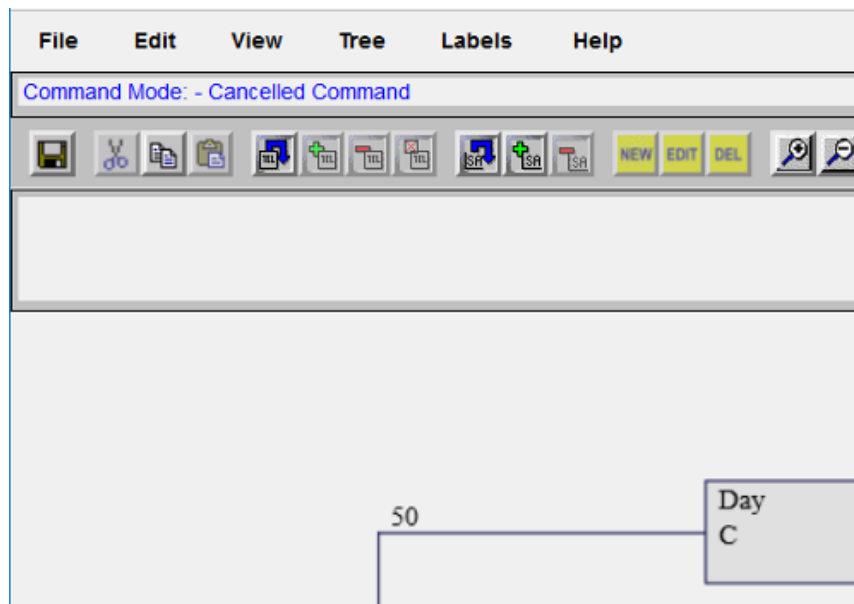
Command Mode

Command Mode provides keyboard-driven commands to execute operations available from the menubar or toolbar. When typing on the keyboard, characters are entered into the node or branch that has focus. Pressing the Escape key puts the user into Command Mode. When in Command Mode, the user may type short strings that execute commands which are normally only available from the menu or toolbar. Pressing the Enter key after the command has been entered will execute that command and then exit Command Mode. If you enter Command Mode by accident, pressing Escape a second time will exit you from Command Mode.

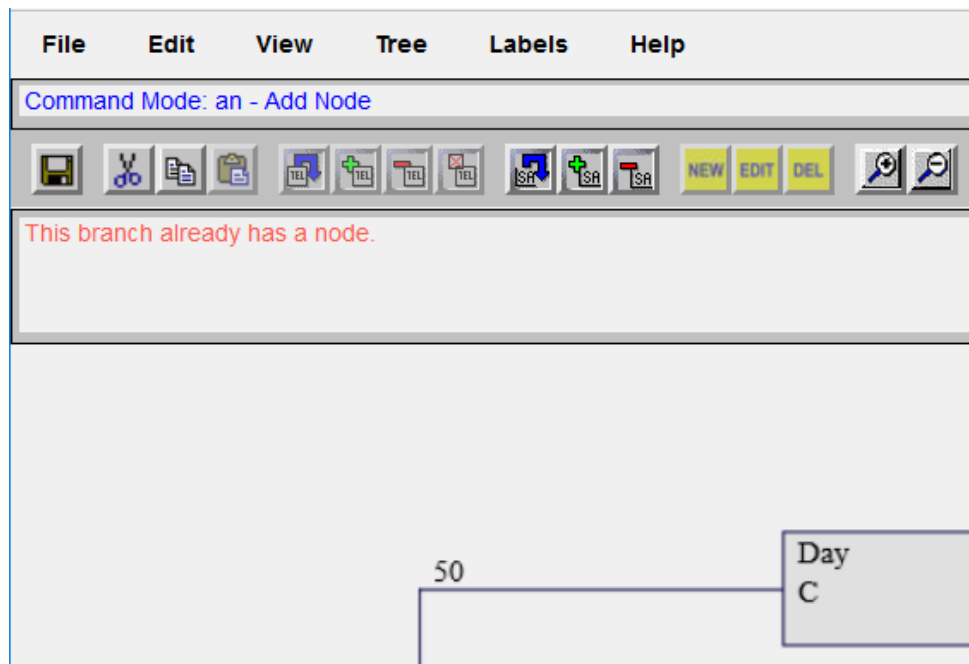
Commands in Command Mode are shown in a new text area located between the Menubar and the Toolbar. The image below shows the Command Mode area immediately after a user has pressed the Escape key.



If the user presses the Escape key again to exit Command Mode, the following is shown.



If a user types a valid command, the command is executed and the Command Mode area shows the name of the command that was executed. In the example below, the user has typed "an" for **Add Node**. The name of the command is shown to the right of the text typed by the user.



Had it been legal to add a node off the current focus branch, a new node would have been added. In this case, however, the focus branch already had a node, so an error is shown instead. This demonstrates another feature of Command Mode. Buttons are dimmed when a command is not available, but for typed commands, feedback is provided if the command is invalid in the current context.

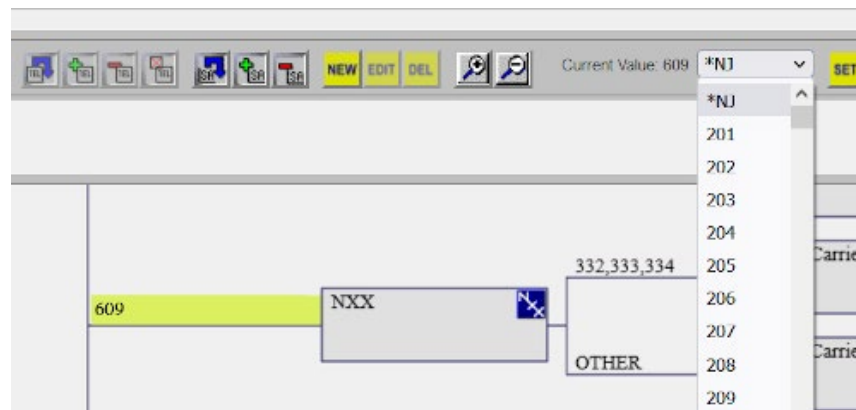
Below is the list of Key Commands available in Command Mode, their equivalent button command, and a brief description of what the command does.



The list of Key Commands equivalent button commands, and a brief description is also available from within the editor by going to the **Help** menu on the Menubar and selecting **Command Mode Help**.

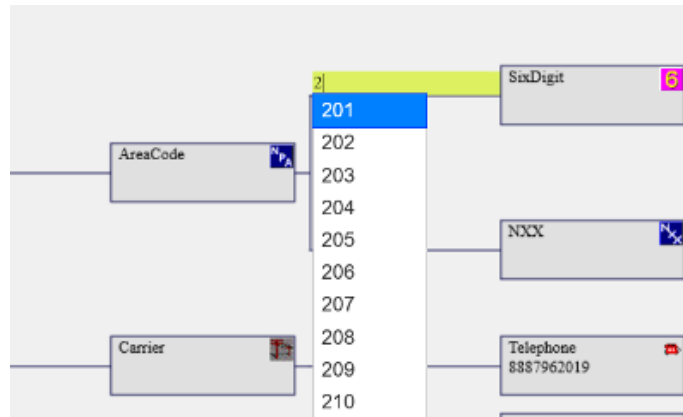
Choice Lists

A context-sensitive choice list is available on the upper right of the editor, as shown in the screen shot below.

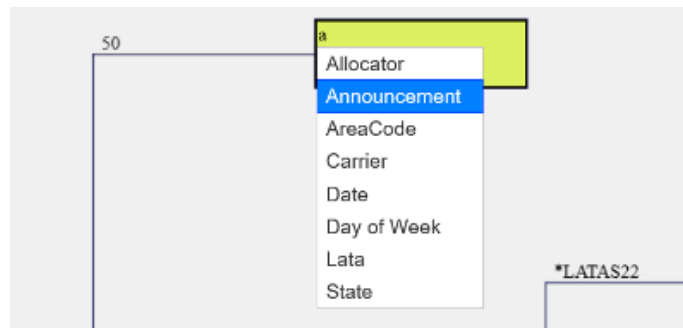


This choice list is populated with a set of values for the field that currently had focus. If focus is on the node type field of a Node, this list contains all node types. If focus is on a branch, this list contains all labels whose type matched the branch's parent node type and also contains the value "OTHER". In addition, if focus is on a branch off of a geographic node such as State, Lata, or Area Code, the geographic values (e.g. all states) are also available, but only if that list of values is a reasonably limited set of values. Specifically, all State, Lata and Area Code choices are available in this list. NXX, SixDigit and TenDigit values, since these lists are extremely large, are not available.

In addition to the choice list on the upper right, another choice list is available to speed up data entry. This list will appear immediately below the node/branch field that has focus. As you type, this list automatically reduces itself to all matching values until you reach a single value. When the list has a single item, pressing the Enter key will enter that value into the field. An AreaCode choice list example is shown below.



Users should be aware that the choice list matching for these choice lists does not match items in the list that start with the typed letters but instead matches ANY string containing the letters typed by the user. For example, if focus is on the node type field and the user types "a" it matches all node types that contain an "a", not just those node types that start with an "a". Thus, the list would contain *Allocator*, *Announcement*, *AreaCode*, *Carrier*, *Date*, *Day of Week*, *Lata* and *State* rather than just *Allocator*, *Announcement* and *AreaCode*. The screen shot below shows this example.

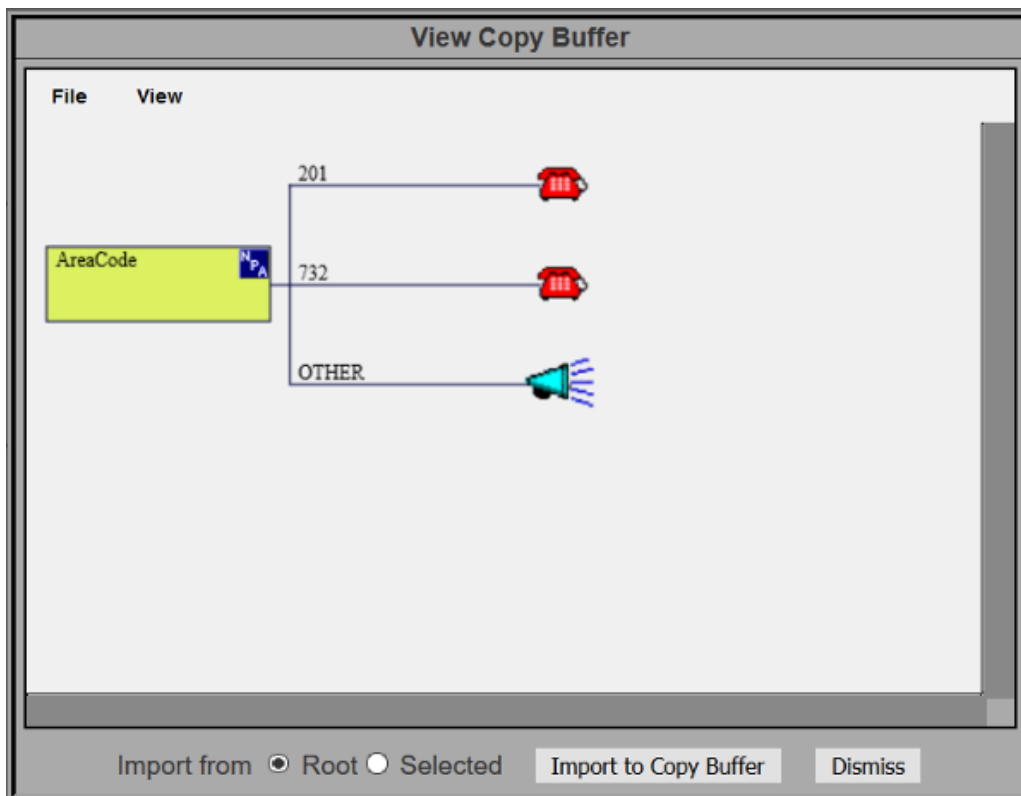


The Copy Buffer

Traditionally, a copy buffer allows users to cut and copy to a buffer and then paste the contents of that buffer somewhere else. In editplan, this has been extended to allow users to

- View the contents of the buffer as a graphical tree
- Save the contents of the buffer as a new local CPR
- Open an existing CPR and store it, or a subtree of it, into the buffer

To access the Copy Buffer Dialog, after copying something into the buffer, go to the **Edit** menu on the Menubar and click the **View Copy Buffer** button. The **View Copy Buffer** dialog will appear as shown below.



This dialog is read-only; the copy buffer CPR may not be edited in any way. The toolbar, context menu and command mode are not available, but the dialog does provide a menu bar with a subset of the commands normally available, as shown below.

File

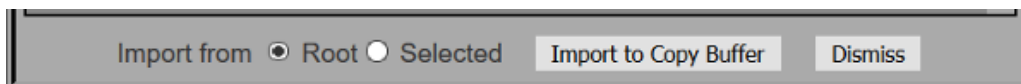
Import Dialed Number Plan, Import SMS Template Plan, Export Dialed Number Plan, Export SMS Template Plan

View

Graphical, Balanced, Zoom In, Zoom Out, Fit to Window, Normal View, View Labels

Skipping over the **File** menu for a moment, the **View** menu provides commands for toggling between graphical and non-graphical as well as balanced and non-balanced. The four zoom commands are also available. The final button on the **View** menu is the **View Labels** button, which provides the ability to view label definitions for the CPR in the Copy Buffer.

The **File** menu on the **View Copy Buffer** dialog provides the ability to import a plan into the Copy Buffer and export the Copy Buffer as a local plan. Importing a plan uses the two **Import** commands and the area at the bottom of the dialog, as shown below.



To import a plan into the Copy Buffer, select the **Import Dialed Number Plan** or **Import SMS Template Plan** button. These buttons behave like the **Open Dialed Number Plan** or **Open SMS Template Plan** buttons except the selected plan is opened into the **View Copy Buffer** dialog. Once this is done, the user simply needs to select the **Import to Copy Buffer** button and the subtree in the Copy Buffer will be overwritten with the newly selected plan.



Opening a plan does not automatically import/overwrite the Copy Buffer. To move this plan into the Copy Buffer the user must select the **Import to Copy Buffer** button.

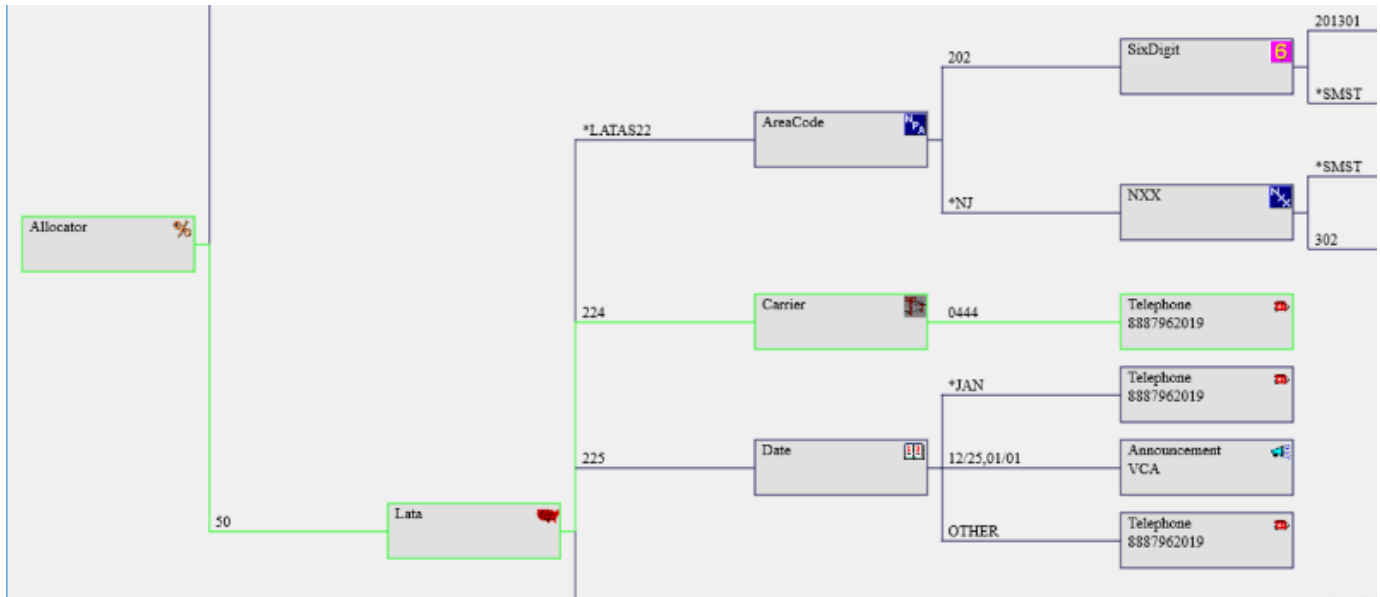
To the left of the **Import to Copy Buffer** button is the label *Import from* and two radio buttons labeled *Root* and *Selected*. These radio buttons are used to specify what portion of the plan will be written to the Copy Buffer. By default, the entire plan is written as specified by the **Root** button being selected. To import a portion of the current plan rather than the entire plan, click on a node so that it highlights in yellow and then check the **Selected** radio button to indicate this will be the root of the imported plan. Now select the **Import to Copy Buffer** button. The Copy Buffer will be overwritten with the subtree beginning with the selected node rather than the root node.

The *Import from* radio buttons provide a second function; they allow the user to select a subtree from the current Copy Buffer. To do this, open the **View Copy Buffer** dialog, select the node of the subtree desired, check the *Selected* button and then select the **Import to Copy Buffer** button. This modifies the current Copy Buffer subtree.

To export a plan from the Copy Buffer back to 8MS, select the **Export Dialed Number Plan** or **Export SMS Template Plan** button. These buttons behave like the **Save-As Dialed Number Plan** or **Save-As SMS Template Plan** buttons and will save the Copy Buffer as a local plan.

Highlighting CPR Paths

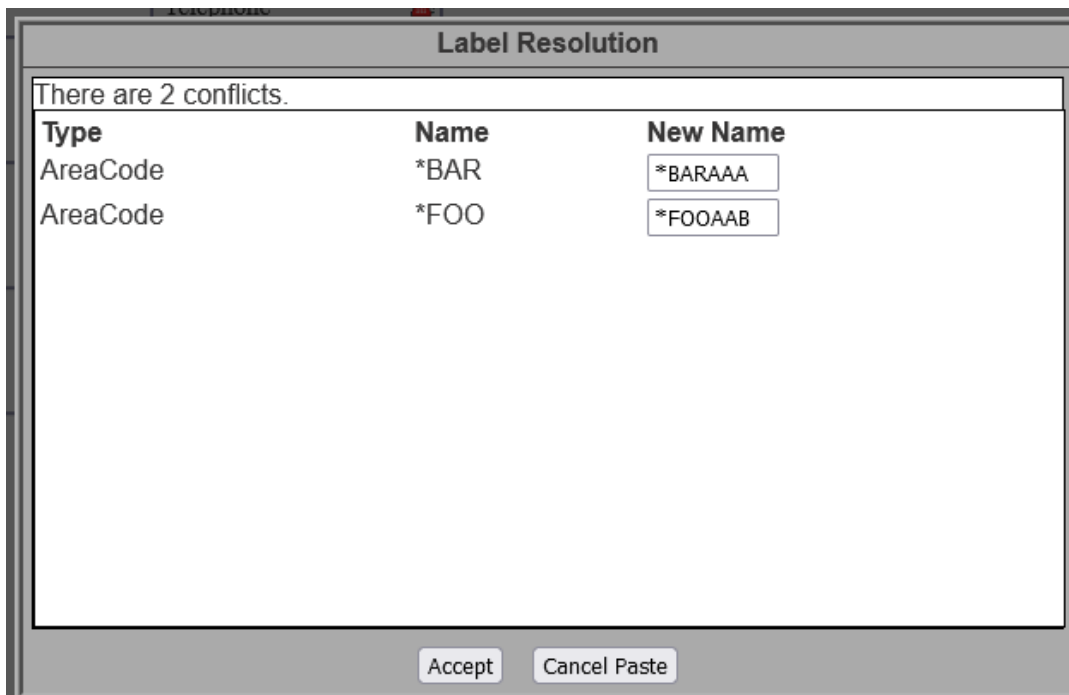
Highlighting provides the ability to select one or more paths and show the node and branch lines in a different color, (green by default). This is intended to allow you to focus your view on these particular paths for debugging call routing and makes group discussion easier. A highlighting example is shown below.



- From the **Tree** menu, clicking on the **Highlight this Path** button highlights this node, all it's children and it's path to the root node.
To highlight a single path, go to the leaf node and then click the **Highlight this Path** button.
- From the **Tree** menu, clicking on the **Unhighlight this Path** button turns off highlighting for this path and all it's children. Parent nodes are left highlighted if the current node has siblings.
- From the **Tree** menu, clicking on the **Unhighlight Tree** button turns off all highlighting in this tree.

Label Name Conflicts

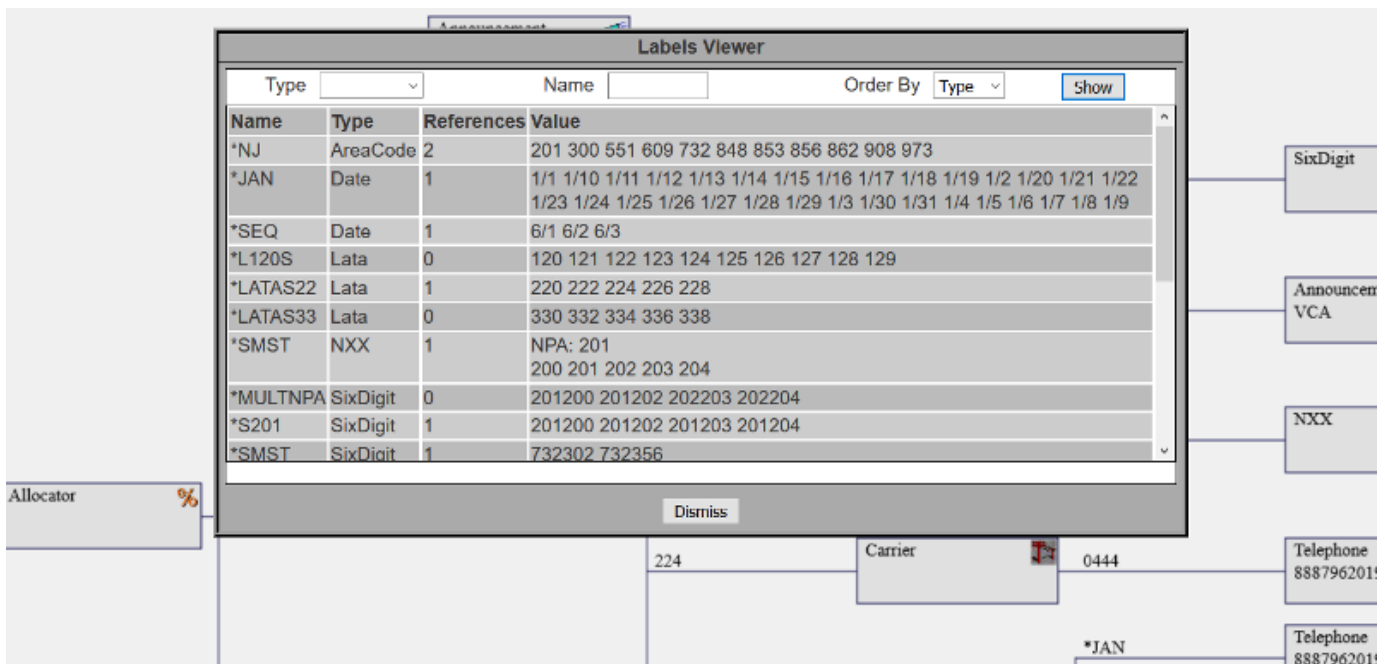
When pasting CPR and/or label data, it is possible there will be conflicting label names (that is, labels copied from the first plan that also exist in the second with the same type and different values). If conflicts exist, the following popup will be presented to help the user resolve the conflicts:



This screen shows the labels in conflict, along with their type. The **New Name** column suggests a new, unique name for each conflict. The user can replace the suggested names as desired and hit the **Apply** button. If there are conflicts with the newly supplied names, the popup will appear again. Otherwise, the imported labels are pasted into the current CPR.

Labels Viewer Dialog

A dialog is available that allows you to view your label definitions outside of the individual Label Editors. To access this dialog, go to the **Labels** menu on the Menubar and click the **View Labels** button. The **View Labels** dialog will appear as shown below.



Labels may be filtered by type or by name. They may also be ordered by type (and then name) or by name (and then type). After specifying any filtering or ordering, select the **Show** button and all matching labels will be shown in the scrolling section below the filters area.



If focus is set on a branch or node-specific field that contains a label, bringing up the **View Labels** dialog will cause the dialog



to appear with the detail of that label showing in the dialog, as if you had filtered by that type and name.

Label Management

Maintenance of the LAD portion of a customer record is accomplished within the CPR editor. Labels can be created for any node type that accepts a *label name* as a branch value. All label names in SMS/800 must start with a *, followed by 1 to 7 additional characters.

8MS provides *label editors* that allow values to be associated with labels. Each label editor has its own unique appearance and behavior. For example, the LATA label editor allows LATAs to be selected, the Area Code label editor allows NPAs to be selected, etc. After selecting the desired values for the label, hit the **Save** button to save the label changes.

Label editors appear as new (*popup*) windows. Each label editor is described in detail below. There are two ways to invoke a label editor:

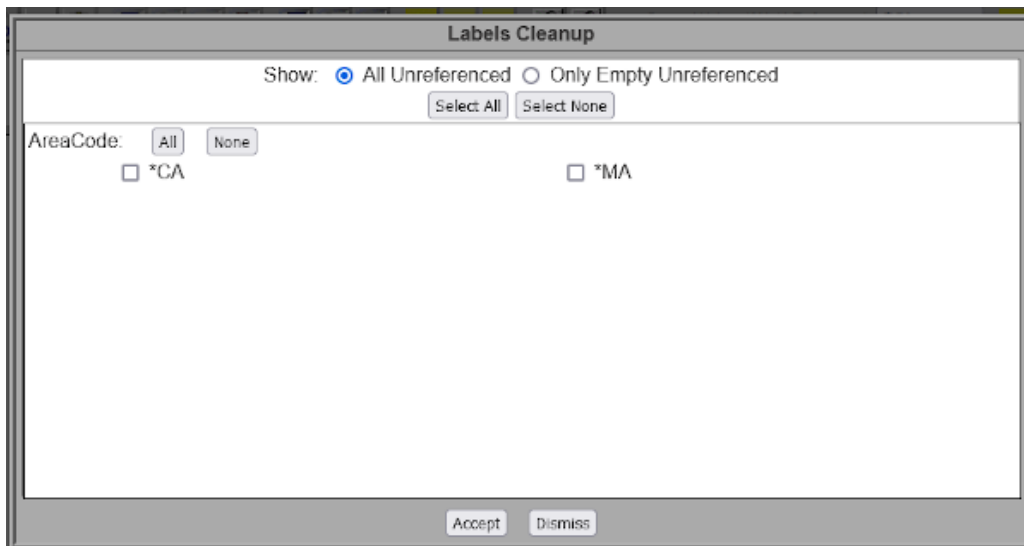
- Use the **NEW** button to create a new label. The label editor will be invoked with no current label name, and no values selected. After selecting appropriate values, hit the **Save As...** button. A popup will appear requesting that the name of the new label be entered. (Hitting the **Save** button will act like **Save As...** and bring up the same popup.) NOTE: if the name of an existing label is entered, its values will be overwritten.
- Use the **EDIT** button after selecting a label name on a branch. If the label is currently defined, its current value(s) will be shown in the label editor. The label need not exist to use the **EDIT** button. A new label name can be typed on a branch, and the **EDIT** button selected. This will invoke the label editor for the named label with no initial values. This is a way to create a new label without using the **NEW** button.

In addition to the label editors, there is another form of label creation which allows bulk creation of labels. Multiple labels can be created by typing or pasting data and clicking a few buttons. This is discussed below, in the section **Label Builder**.

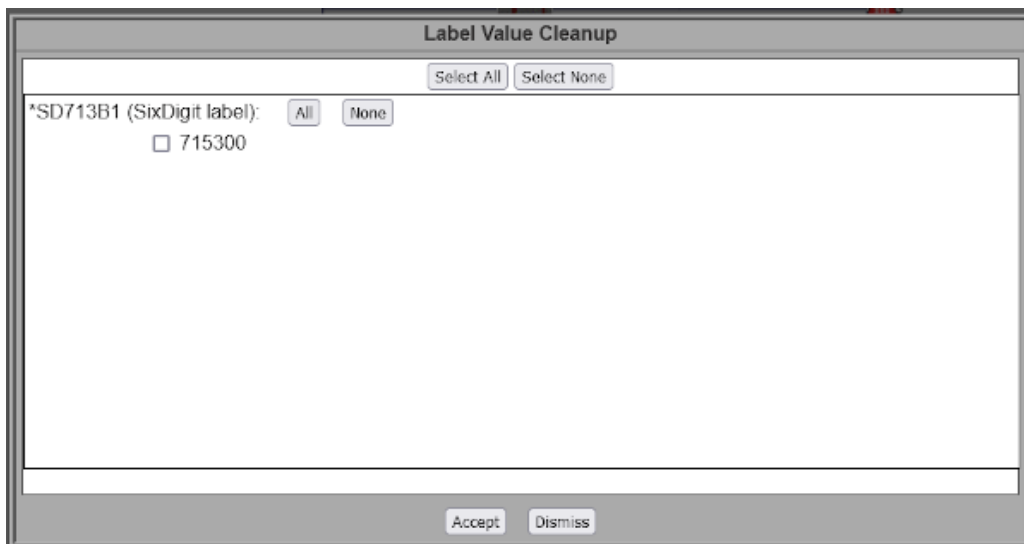
To delete a label, it cannot be in use. A label currently in use anywhere in the tree will automatically be saved with the CPR; it cannot be deleted. Thus, to delete a label, first change all branches that use the label to new values. After changing the last branch, the label name should still be selected in the **Current Value** drop-down. (If not, make sure the current position is on a branch of the desired label type. The unused label should then be on the **Current Value** list.) Once the label to be deleted is selected from the list, hit the **DEL** button (or select **Label -> Delete** from the **Edit** menu).

A means to remove all unused labels in one operation is provided. Select **Cleanup Labels** from the **Labels** menu. This examines the current CPR, looking for unused labels. If any exist, the following popup window appears:

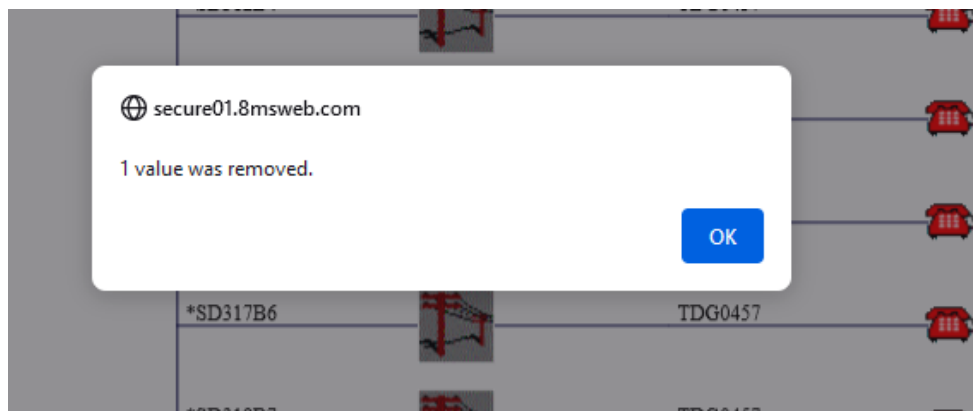
The popup shows unused labels in the current CPR. Select the labels to be deleted, and hit the **Accept** button. Use the **All** and **None** buttons assist in the selection. By default, the popup shows empty, unused labels (that is, labels with no associated value). Selecting **All unreferenced labels** will also show labels that are unused, but have values:



A tool to remove all invalid values from labels is provided. Select **Cleanup Label Values** from the **Labels** menu. This examines the current CPR, looking for label values that have been marked invalid. If any exist, the following popup window appears:



The popup shows all invalid values found in labels. For example, the first entry on the screen above indicates that in the label ***004**, there are two invalid NXXs (386, 417) listed for NPA 202. Select the label values to be deleted, and hit the **Accept** button. Use the **All** and **None** buttons assist in the selection. By default, the popup shows empty, unused labels (that is, labels with no associated value). Upon selecting the **Accept** button, the following confirmation appears:



Label Editor Common Features

Below is an example of a Label Editor, to show the features generally available in all Label Editors.

Lata Label Editor: *LATAS22

*L1205 ==> Find Select Unselect Count: 5

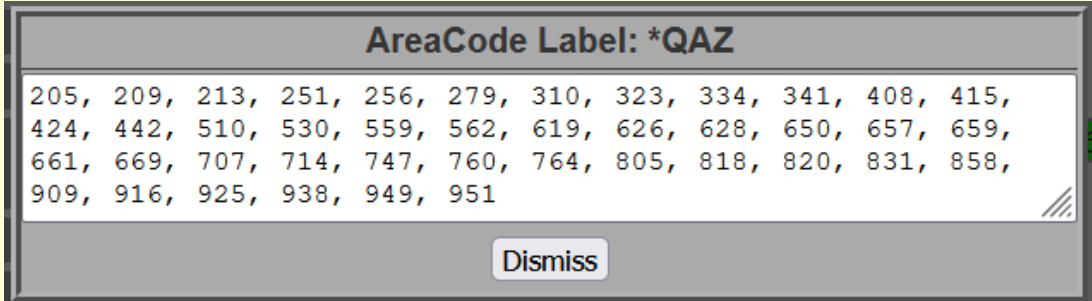
120	122	124	126	128	130	132	133	134	136	138	140	220	222	224	226	228	230
232	234	236	238	240	242	244	246	248	250	252	254	256	320	322	324	325	326
328	330	332	334	336	338	340	342	344	346	348	350	352	354	356	358	360	362
364	366	368	370	374	376	420	422	424	426	428	430	432	434	436	438	440	442
444	446	448	450	452	454	456	458	460	462	464	466	468	470	472	474	476	477
478	480	482	484	486	488	490	492	520	521	522	524	526	528	530	532	534	536
538	540	542	544	546	548	550	552	554	556	558	560	562	564	566	568	570	620
624	626	628	630	632	634	635	636	638	640	644	646	648	650	652	654	656	658
660	664	666	668	670	672	674	676	720	721	722	724	726	728	730	732	734	736
738	740	820	822	824	826	828	830	832	834	850	851	870	871	881	882	883	884
885	886	887	888	889	890	891	892	920	921	922	923	924	927	928	929	930	932
937	938	939	949	951	952	953	956	958	960	961	973	974	976	977	978	980	981
999																	

Select All Select None Invert Selected Hide Unselected Hide Selected Show All

View Save Save As... Cancel

Each label editor has a set of common buttons across the bottom of the dialog.

View Save Save As... Cancel

Button	Description
View	This button allows the contents of a label to be viewed in a popup window.
	
 The area containing the label values may be selected, and copied/pasted into another application.	
Save	This button saves the contents of the current label. If the label builder was invoked from the NEW button then the builder will behave as if the Save As... button was selected.
Save As...	Selecting this button brings up the Label Save As popup.

New AreaCode Label

Label Name

Save Cancel

Enter the new label name and select the **OK** button to save the label or select the **Cancel** button to dismiss the popup.

Cancel Selecting this button dismisses the label builder popup without saving anything.

Most label editors have an additional set of common buttons to make it easier to view a large collection of values. These are located between the label values (main area) and the bottom row of View/Save/Save As/Cancel buttons.

Select All Select None Invert Selected Hide Unselected Hide Selected Show All

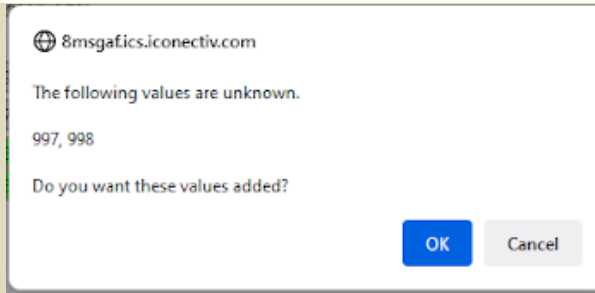
Button	Description
Select All	Selecting this button selects all values. If a label will contain most available values, clicking this button and then unselecting the individual unwanted values may be faster than just selecting the desired values.
Select None	Selecting this button unselects all values.
Invert Selected	Selecting this button swaps the selected and unselected values. Selected values become unselected and unselected values become selected.
Hide Unselected Choices	Selecting this button hides all values that have not been selected.
Hide Selected Choices	Selecting this button hides all values that have been selected.
Show All Choices	Selecting this button shows all values, effectively undoing any previous <i>Hide</i> actions.

A third set of common controls is available on most Label Editors, located at the top of the dialog. These controls are intended to make a large set of possible values easier to manage.

*CA ==> Find Select Unselect Count: 9

Button/Field	Description
find text field	The <i>find</i> field, located in the center of the upper portion of all Label Editors, accepts multiple values, separated by a comma or a space. It is used by the three buttons located to the right of the field.
Find	Clicking this button causes all matching values to be highlighted.
Select	Clicking this button causes all matching values to be highlighted.
Unselect	Clicking this button causes all matching values to be unselected.

If any values in the *find* field do not exist, the user is given the option to add those unknown values as buttons in the main (label values) area. After clicking any of the buttons **Find**, **Select**, or **Unselect** a confirmation window will appear, as shown below.



Click the **OK** button and the value(s) will be added to the set of values.

After being added, the action selected takes effect on those newly added values, i.e. **Find** highlights the values, **Select** selects them and **Unselect** adds them without highlighting or selecting them.

Label List This drop-down list contains all labels of this node type that are associated with this CPR.

==> Selecting a label from the label drop-down to the left of this button and then clicking this button will copy all values from the selected label into the *find* field.

Users may then click any of the **Find**, **Select**, or **Unselect** buttons.

Count The read-only *Count* field shows the number of selected values.



The SixDigit Label Editor does not support the **Select All**, **Select None**, and **Invert Selected** buttons.

Values in a label editor are selected and unselected by clicking on the individual values. In some cases, label values are shown in groups, with group titles, to provide a logical view of the values. Clicking on a group title selects and unselects all values in that group.

Colors are used to indicate the state of individual label values. Unselected values have text in black and a gray background. Selected values have text in black and a green background. To illustrate grouped label values, consider the following two examples:

Area Code values are grouped by state.

AB	403	587	670	671	684	780	825
AK	907						
AL	205	251	256	334	659	938	
AR	479	501	870				

Date values are grouped by month.

Jan	1/01	1/02	1/03	1/04	1/05	1/06	1/07	1/08	1/09	1/10	1/11	1/12	1/13	1/14	1/15	1/16	1/17	1/18	1/19
	1/20	1/21	1/22	1/23	1/24	1/25	1/26	1/27	1/28	1/29	1/30	1/31							
Feb	2/01	2/02	2/03	2/04	2/05	2/06	2/07	2/08	2/09	2/10	2/11	2/12	2/13	2/14	2/15	2/16	2/17	2/18	2/19
	2/20	2/21	2/22	2/23	2/24	2/25	2/26	2/27	2/28	2/29									
Mar	3/01	3/02	3/03	3/04	3/05	3/06	3/07	3/08	3/09	3/10	3/11	3/12	3/13	3/14	3/15	3/16	3/17	3/18	3/19
	3/20	3/21	3/22	3/23	3/24	3/25	3/26	3/27	3/28	3/29	3/30	3/31							

These examples are shown to highlight color meanings. Individual selected values are shown in green. If values are grouped, the group title is shown in green if all values in that group are selected. The group title is shown in yellow if some, but not all, values in that group are selected. For the **Area Code** example, the group title *AB* is shown in yellow because only the first two values are selected, while the group title *AL* is shown in green because all values in that group are selected. For the **Date** example, the group title *Jan* is shown in yellow because only five values are selected, while the group title *Feb* is shown in green because all values in that group are selected.

Invalid values are shown with the text in red, as shown below in a **LATA** example. Unselected invalid values have text in red and a gray background.

110	120	122	124	126	128	130
242	244	246	248	250	252	254

Selected invalid values text in red and a green background.

110	120	122	124	126	128	130
242	244	246	248	250	252	254

Invalid label values are those that are not currently known in the telephony network. As an example, 911 cannot be a valid area code. Where label values are grouped, invalid values will be shown at the top of the list of values, with a group title of *!!*, as shown in the **Area Code** example below.

!!	911				
AB	403	587	670	671	684
AK	907				

Where label values are not grouped, invalid values will be shown in their proper alphanumeric position, as shown in the **LATA** example below.

721	722	724	726	728	730
921	922	923	924	925	927
977	978	980	981	983	999

Label Editors

SMS/800 supports labels for 9 node types: **Area Code**, **Date**, **LATA**, **NX**, **Six Digit**, **State**, **Ten Digit**, **Telephone** and **Time**. **Telephone** labels are used in the node-specific data area; all other label types are used on branches. 8MS provides a label editor for each. They are described below.

Area Code

Below is a screenshot of the Area Code label editor:

Area Code Label Editor: *QAZ

*CA ==> Find Select Unselect Count: 9

AB	403	587	670	671	684	780	825															
AK	907																					
AL	205	251	256	334	659	938																
AR	479	501	870																			
AZ	480	520	602	623	928																	
BC	236	250	604	672	778																	
CA	209	213	279	310	323	341	408	415	424	442	510	530	559	562	619	626	628	650	657	661	669	707
	714	747	760	764	805	818	820	831	858	909	916	925	949	951								
CO	303	719	720	970																		
CT	203	475	860	959																		
DC	202																					
DE	302																					

Select All Select None Invert Selected Hide Unselected Hide Selected Show All

View Save Save As... Cancel

This label editor contains all features discussed above in the section [Label Editor Common Features](#).

Date

Below is a screenshot of the Date label editor:

Date Label Editor: *FOO

*FOO ==> Find Select Unselect Count: 7

Jan	1/01	1/02	1/03	1/04	1/05	1/06	1/07	1/08	1/09	1/10	1/11	1/12	1/13	1/14	1/15	1/16	1/17	1/18	1/19
	1/20	1/21	1/22	1/23	1/24	1/25	1/26	1/27	1/28	1/29	1/30	1/31							
Feb	2/01	2/02	2/03	2/04	2/05	2/06	2/07	2/08	2/09	2/10	2/11	2/12	2/13	2/14	2/15	2/16	2/17	2/18	2/19
	2/20	2/21	2/22	2/23	2/24	2/25	2/26	2/27	2/28	2/29									
Mar	3/01	3/02	3/03	3/04	3/05	3/06	3/07	3/08	3/09	3/10	3/11	3/12	3/13	3/14	3/15	3/16	3/17	3/18	3/19
	3/20	3/21	3/22	3/23	3/24	3/25	3/26	3/27	3/28	3/29	3/30	3/31							
Apr	4/01	4/02	4/03	4/04	4/05	4/06	4/07	4/08	4/09	4/10	4/11	4/12	4/13	4/14	4/15	4/16	4/17	4/18	4/19
	4/20	4/21	4/22	4/23	4/24	4/25	4/26	4/27	4/28	4/29	4/30								
May	5/01	5/02	5/03	5/04	5/05	5/06	5/07	5/08	5/09	5/10	5/11	5/12	5/13	5/14	5/15	5/16	5/17	5/18	5/19
	5/20	5/21	5/22	5/23	5/24	5/25	5/26	5/27	5/28	5/29	5/30	5/31							
Jun	6/01	6/02	6/03	6/04	6/05	6/06	6/07	6/08	6/09	6/10	6/11	6/12	6/13	6/14	6/15	6/16	6/17	6/18	6/19
	6/20	6/21	6/22	6/23	6/24	6/25	6/26	6/27	6/28	6/29	6/30								

Select All Select None Invert Selected Hide Unselected Hide Selected Show All

View Save Save As... Cancel

This label editor contains all features discussed above in the section [Label Editor Common Features](#).

LATA

Below is a screenshot of the LATA label editor:

Lata Label Editor: *FOO

*FOO ▾ ==> Find Select Unselect Count: 0

120	122	124	126	128	130	132	133	134	136	138	140	220	222	224	226	228	230	232	234	236	238	240	242
244	246	248	250	252	254	256	320	322	324	325	326	328	330	332	334	336	338	340	342	344	346	348	350
352	354	356	358	360	362	364	366	368	370	374	376	420	422	424	426	428	430	432	434	436	438	440	442
444	446	448	450	452	454	456	458	460	462	464	466	468	470	472	474	476	477	478	480	482	484	486	488
490	492	520	521	522	524	526	528	530	532	534	536	538	540	542	544	546	548	550	552	554	556	558	560
562	564	566	568	570	620	624	626	628	630	632	634	635	636	638	640	644	646	648	650	652	654	656	658
660	664	666	668	670	672	674	676	720	721	722	724	726	728	730	732	734	736	738	740	820	822	824	826
828	830	832	834	870	871	884	888	920	921	922	923	924	927	928	929	930	932	937	938	939	949	951	952
953	956	958	960	961	973	974	976	977	978	980	981	999											

Select All Select None Invert Selected Hide Unselected Hide Selected Show All

View Save Save As... Cancel

With the exception of grouping of label values, this label editor contains all features discussed above in the section [Label Editor Common Features](#).

NXX

Below is a screenshot of the NXX label editor:

NXX Label Editor: *FOO

NPA 201 Change

*FOO ==> Find Select Unselect Count: 0

200	201	202	203	204	205	206	207	208	209	210	212	213	214	215	216	217	218	219	220	221	222	223
224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246
247	248	249	250	251	252	253	254	255	256	257	258	259	261	262	263	264	265	266	267	268	269	270
271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293
294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	312	313	314	315	316	317
318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340
341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363
364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386
387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409
410	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433
434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456
457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479
480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502
503	504	505	506	507	508	509	510	512	513	514	515	516	517	518	519	520	521	522	523	524	525	526

Select All Select None Invert Selected Hide Unselected Hide Selected Show All

View Save Save As... Cancel

With the exception of grouping of label values, this label editor contains all features discussed above in the section [Label Editor Common Features](#).

NXX labels contain values for a single NPA. The set of values shown in the dialog is based on the NPA selected. The default NPA selected when creating a new NXX label is 201, the first valid NPA. If a different NPA is desired, select it from the NPA drop-down list and then click the **Change** button, as shown below.

NXX Label Editor: *FOO

NPA 201 Change

All current selections will be discarded, and the valid NXXs for the newly selected NPA will be displayed.

Six Digit

Below is a screenshot of the Six Digit label editor:

Six Digit Label Editor: *FOO

NPA

*FOO Count: 2

201	200	201	202	203	204	205	206	207	208	209	210	212	213	214	215	216	217	218	219	220	221	222
	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244
	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	261	262	263	264	265	266	267
	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289
	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	312
	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334
	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356
	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378
	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400
	401	402	403	404	405	406	407	408	409	410	412	413	414	415	416	417	418	419	420	421	422	423
	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445
	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467
	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489
	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	512

This label editor contains all features discussed above in the section [Label Editor Common Features](#). NXXs are grouped by their NPA.

Six Digit labels contain values for one or more NPAs. Each individual value is composed of a 3 digit NPA and a 3 digit NXX. The Six Digit label editor shows NXXs, grouped by their NPA, sorted in NPA numeric order. If one or more NXXs for some NPA are selected, all NXXs for that NPA are shown, followed by the next NPA with one or more NXXs selected.

Only NPAs that have one or more NXXs selected are shown in the main work area. When creating a new Six Digit label, the label editor starts out with no values in it.

To add an NPA and its NXXs, select the NPA from the NPA drop-down list and then click the **Add** button, as shown below.

All NXXs for that NPA will be added, grouped by the NPA. When adding additional NPAs, the dialog will automatically scroll so that the newly added NPA is shown at the top of the dialog.

After multiple NPAs have been added to a Six Digit label, it can be cumbersome to find particular NPA/NXX pairs to select. Using the *find* field and its associated **Find**, **Select**, and **Unselect** buttons will make it easier to find, select and unselect specific six digit values. When any of these buttons are clicked, the dialog will automatically scroll so that the numerically first value in the *find* field scrolls into view. If multiple different NPAs are specified in the *find* field, clicking the **Find** button will scroll to the numerically first value, whereas clicking the **Select** or **Unselect** buttons will scroll to the numerically last value. The reason for the difference is that the select and unselect buttons are performing work on the values, whereas the find button is just searching. Scrolling to the numerically last value for a select or unselect action indicates that the other values were also selected or unselected.

State

Below is a screenshot of the State label editor

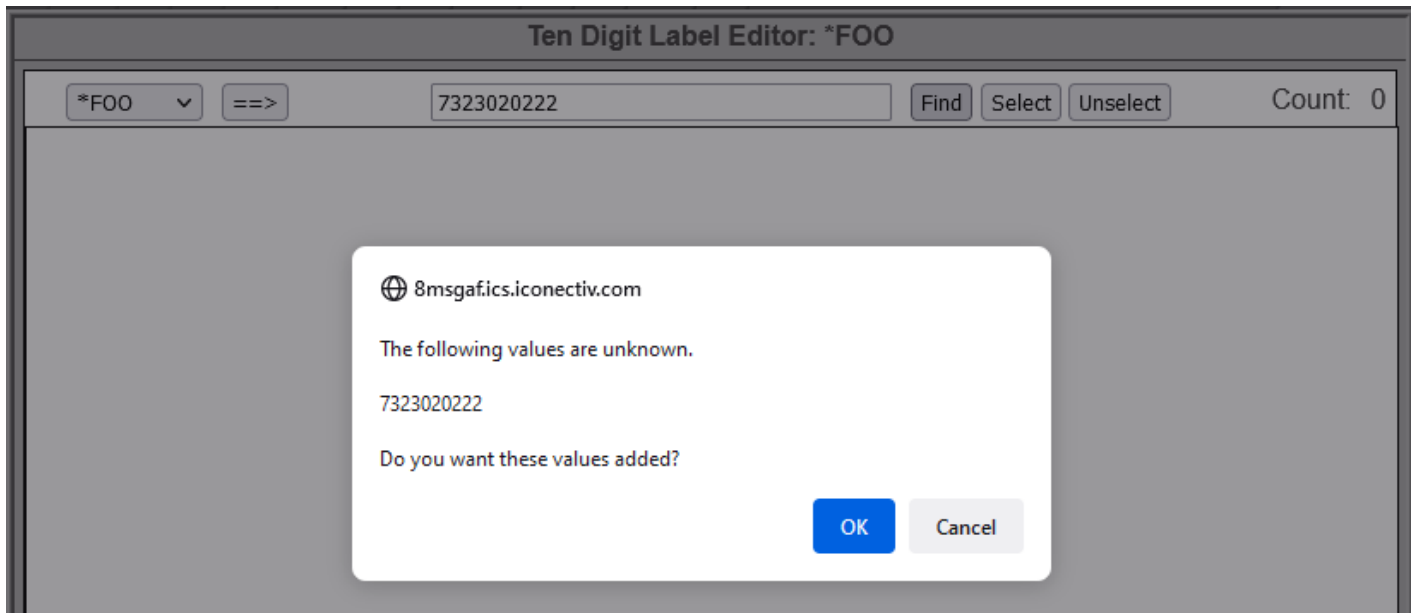
With the exception of grouping of label values, this label editor contains all features discussed above in the section [Label Editor Common Features](#).

Ten Digit

Below is a screenshot of the Ten Digit label editor:

With the exception of grouping of label values, this label editor contains all features discussed above in the section [Label Editor Common Features](#).

Unlike the other label editors, the Ten Digit label editor starts out with no values in it. To add a number, type the ten digits in the *find* field and click the **Find** or **Select** button. A confirmation window will appear, as shown below.

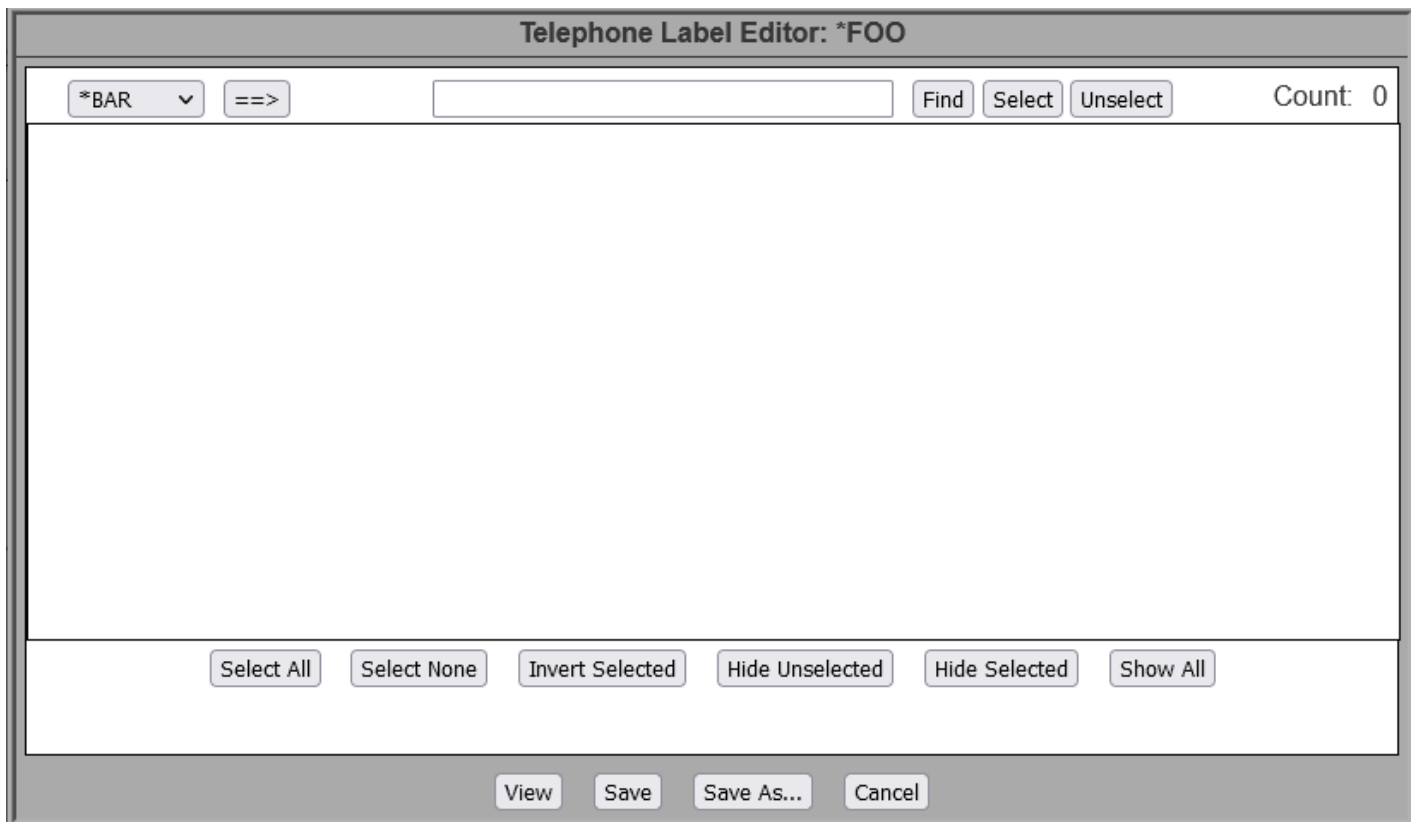


Click the **OK** button and the number will be added as a new value. If **Find** was clicked, the newly added values will be highlighted. If **Select** was clicked, the newly added values will be shown in green.

To remove a number from the label, unselect the number. It will turn gray, and will not be saved with the label when **Save** is clicked.

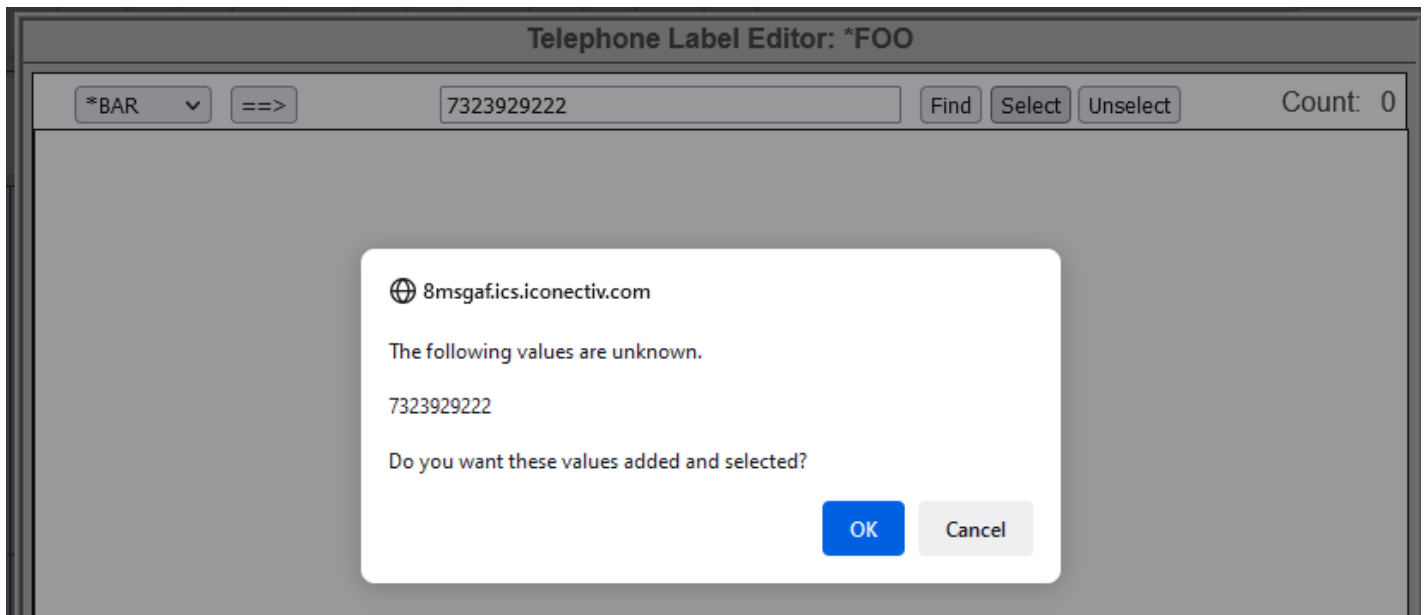
Telephone

Below is a screenshot of the Telephone label editor:



With the exception of grouping of label values, this label editor contains all features discussed above in the section [Label Editor Common Features](#).

Unlike the other label editors, but similar to the Ten Digit label editor, the Telephone label editor starts out with no values in it. To add a toll-free number, type the ten digits in the *find* field and click the **Find** or **Select** button. A confirmation window will appear, as shown below.



Click the **OK** button and the number will be added as a new value. If **Find** was clicked, the newly added values will be highlighted. If **Select** was clicked, the newly added values will be shown in green.

To remove a number from the label, unselect the number. It will turn gray, and will not be saved with the label when **Save** is clicked.



A single toll free or POTS number may be added to a Telephone label.

Time

Below is a screenshot of the Time label editor:

Time Label Editor: *FOO

*FOO ==> Find Select Unselect Count: 0

12M	12:00A-12:15A	12:15A-12:30A	12:30A-12:45A	12:45A-01:00A
01A	01:00A-01:15A	01:15A-01:30A	01:30A-01:45A	01:45A-02:00A
02A	02:00A-02:15A	02:15A-02:30A	02:30A-02:45A	02:45A-03:00A
03A	03:00A-03:15A	03:15A-03:30A	03:30A-03:45A	03:45A-04:00A
04A	04:00A-04:15A	04:15A-04:30A	04:30A-04:45A	04:45A-05:00A
05A	05:00A-05:15A	05:15A-05:30A	05:30A-05:45A	05:45A-06:00A
06A	06:00A-06:15A	06:15A-06:30A	06:30A-06:45A	06:45A-07:00A
07A	07:00A-07:15A	07:15A-07:30A	07:30A-07:45A	07:45A-08:00A
08A	08:00A-08:15A	08:15A-08:30A	08:30A-08:45A	08:45A-09:00A
09A	09:00A-09:15A	09:15A-09:30A	09:30A-09:45A	09:45A-10:00A
10A	10:00A-10:15A	10:15A-10:30A	10:30A-10:45A	10:45A-11:00A
11A	11:00A-11:15A	11:15A-11:30A	11:30A-11:45A	11:45A-12:00A

Select All Select None Invert Selected Hide Unselected Hide Selected Show All

View Save Save As... Cancel

This label editor contains all features discussed above in the section [Label Editor Common Features](#). 15 minute interval time values are grouped by their hour and meridiem (A/P).



To avoid confusion regarding 12am and 12pm, the group titles for these two hours are shown as 12M (midnight) and 12P (noon).

Node Types

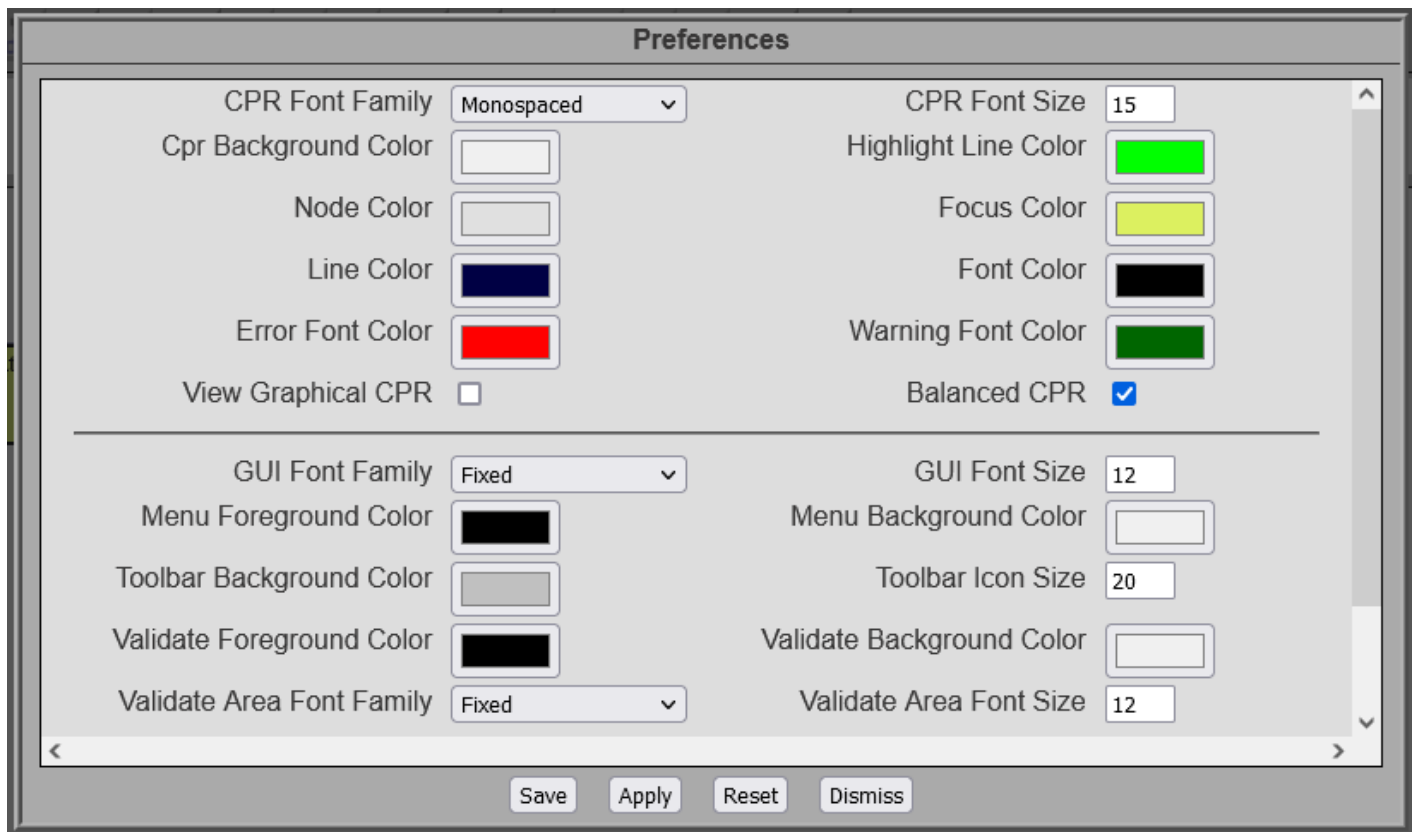
The table below describes each node type, its valid values, and the valid branch values:

Node Type	Valid Node Values	Valid Branch Values
Allocator	N/A	Number from 1-99
Announcement	OBA or VCA	N/A
AreaCode	N/A	Three area codes, a label name, or OTHER
Carrier	N/A	CIC or ACNA-CIC
Date	Time Zone Indicator	Specific Date (mm/yy), a label name, or OTHER
Day	Time Zone Indicator	Su, M, Tu, We, Th, F, Sa or OTHER

LATA	N/A	Specific LATA, a label name, or OTHER
NXX	N/A	Specific NXX, a label name, or OTHER
Six Digit	N/A	Specific NPANXX, a label name, or OTHER
State	N/A	Specific state abbreviation, a label name, or OTHER
Switch	N/A	ON, OFF
Telephone	Toll free or POTS #	N/A
Ten Digit	N/A	Specific 10 digit number, a label name, or OTHER
Time	Time Zone Indicator	Specific time range (e.g., 11:00A-01:00P), a label name, or OTHER

Preferences

EditPlan's colors and fonts are highly customizable. To access the Preferences Dialog, go to the **Edit** menu on the Menubar and click the **Preferences** button. The **Preferences** dialog will appear as shown below.



Customizations are split between the CPR drawing (nodes and branches) and the rest of the GUI (menus, buttons and other objects). The top half of the dialog defines the CPR drawing, while the bottom half defines the GUI, with a line splitting the 2 portions.

Changes may be applied in 2 different ways.

- The **Apply** button saves changes for this instance of EditPlan. When you exit, all preference changes are thrown away.
- The **Save** button saves changes for this instance and also saves the preferences in your 8MS settings. When you exit, these preference changes are retained and will be used the next time you bring up the editor.

It is strongly recommended that you test your changes using



the **Apply** button. If the appearance is to your liking, you may then save your changes using the **Save** button.

Before you've clicked the **Apply** or **Save** button you may throw away all changes by doing one of the following.

- Click the **Reset** button. This leaves the Preferences dialog up but sets all preferences back to their initial values.
- Click the **Dismiss** button. This will take down the Preference dialog without committing any changes.

Fonts

Both the font family and size may be modified. Be cautious about making your font too small or too large, or the screen may become difficult to read.



Unless there is a specific need, it is strongly recommended that you don't change the **CPR Font Family**, as this affects the layout of the CPR within the editor because the line and box sizes are relative to the size of the font. Fixed width fonts should be used or boxes and lines become very wide.

Customization by Area

Section	Customization
CPR	The colors for the CPR section affect the lines, boxes, node/branch text, node/branch error text, and dialog background. The checkboxes are related to the Graphical and Balanced buttons available from the View menu on the menubar. As discussed above, you can also change the font and size. Be cautious when changing the font!
Menubar	The colors for the Menu affect both the menubar and the context-sensitive menu available by clicking right on a node or branch.
Toolbar	For the toolbar, you can change the background color and you can increase or decrease the size of the icons. Since the icons are square, only a single size value is needed to be specified.
Validation Feedback	The Validation Feedback area is the box below the Toolbar. Background and foreground colors may be modified, as well as the font and size.

This function allows you to change the RespOrg for a toll-free number. You can also change the RespOrg for an entire list of toll-free numbers in one operation (see **Batch RespOrg Change** below.)

In the menu frame, select the **Change RespOrg** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



To change the RespOrg for a single dialed number, enter it in the **Toll Free Number** field. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

Enter the new RespOrg in the **New RespOrg** field.

Select the **Send** button. A message will appear in the response frame indicating the status of the request.

NOTE: if the **Change RespOrg** screen appears without the response frame, this indicates that the new SMS/800 change RespOrg message is being used. This message does not guarantee real-time response. Use the **Activity Log** to determine the result of the RespOrg change request.

Batch RespOrg Change

This function allows you to change the RespOrg for a list of toll free numbers in one operation. The new RespOrg for all numbers in the list will be the value specified in the **New RespOrg** field described above. Thus, all numbers in batch RespOrg change must be changed to same Resp Org. A second batch operation is needed to change another group of numbers to a different RespOrg.

Select the **Send Batch** button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This function allows you to submit **ROC Authorization Requests**. request.

In the menu frame, select the **ROC Submit Request** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:

Submit ROC Request

Toll Free Number 

Number List  or 

Future Request Date

Requesting RespOrg

LOA File No file selected. No file generated.

LOA File Size

Notes

Other Documentation No files selected.

File	Size	Comments

To submit a ROC Authorization request, specify one or more toll-free numbers, the Resp Org requesting control of those numbers and proof that the **Customer of Record** has requested these numbers. Below is a description of each field on this screen.

Field	Description
Toll Free Number	If this authorization request will contain a single number, enter that number here. Only one of Toll Free Number, Number List,  (Dynamic List of Numbers) may be selected.
Number List	If this authorization request will contain multiple numbers, select the Number List that contains the numbers you are requesting.

Only one of **Toll Free Number**, **Number List**, or  (**Dynamic List of Numbers**) may be selected.



If this authorization request will contain multiple numbers, you may create a **Dynamic List of Numbers** by entering them in the **Dynamic List of Numbers** popup associated with this button. See the **Dynamic List of Numbers** section of **Choice Lists** for details on this button and how to use it.

Only one of **Toll Free Number**, **Number List**, or  (**Dynamic List of Numbers**) may be selected.

Future Request Date

To schedule this authorization request for a future date, specify that date here. The request will be sent to SMS/800 and saved there until that date has been reached. At that point, the authorization request will be sent to the controlling Resp Org. The format of this field is *MM/DD/YY*.

The vast majority of the time, users do not set a **Future Request Date**. Somos then immediately sends the ROC request to the controlling Resp Org.



Providing a **Future Request Date** means Somos will create the ROC request but will not send it to the controlling Resp Org until the day of the **Future Request Date**. This means the controlling Resp Org won't be able to see the request, or respond to it, until the date you specified.

We strongly recommend that you do not set the Future Request Date parameter unless you fully understand what this means.

Requesting Resp Org

The Resp Org asking for control of this group of numbers.

A default Resp Org may be populated. This is controlled by the preference **RocDefaultResporg**.

LOA File

A document that provides proof that the **Requesting Resp Org** has the right to ask for control of this number.

To the right of the **LOA File** file selector is the **Clear** button. Clicking this button will clear the selected file.

File names may only contain



- A-Z
- a-z
- 0-9
- underscore (_)
- hyphen (-)

The maximum length of the file name is 100 characters.

Generate LOA Generate the document that provides proof that the **Requesting Resp Org** has the right to ask for control of this number.

Clicking this button will display the **Create a new LOA File** dialog.

To the right of the **Generate LOA** button, the generated file will appear as a link. Clicking on this document will cause your browser to open the document in your standard way, depending on your operating system and browser settings. The document can be downloaded and saved locally.

LOA File Size This field is read-only. When a **LOA File** has been selected, the size of the file will be shown in this field.

Notes Any additional notes that may help the controlling Resp Org to verify and process the authorization request.

Other Documentation Any additional documents that may help the controlling Resp Org to verify and process the authorization request. Multiple documents may be selected.

Once the documents have been selected, the box below this field will be populated with the names of the files, the size of each file and a **Comments** field. Enter any additional comments next to each file if this will help the controlling Resp Org when processing the authorization request.

To the right of the **Other Documentation** file selector is the **Clear** button. Clicking this button will clear out any selected files.



After selecting **LOA File** and **Other Documentation** files, the size of each file is shown on the main screen. This is done because SMS/800 has a limit on the total size of all documents that may be uploaded for a single authorization request. As the size limit is determined by SMS/800 and could change at any time, no size checks are done within the 8MS user interface.

Below is an example of file information after a user has selected several **Other Documentation** files. Note the size of the files and the **Comments** field to the right of each file. Comments are required for every file as they

aid in identifying how each file supports the authorization request.

File	Size	Comments
2016-02-03 DL435.pdf	816487	
A4D3289.pdf	30469	
BL224-73.pdf	271067	

After specifying the toll-free number(s) and associated data, select the **Send** button. A popup will appear over the main screen, showing the status of the request. Unlike most 8MS screens, this screen may send multiple messages to SMS/800, one for the authorization request itself and one for each additional document specified in the **Other Documentation** list. Since SMS/800 has a limit on the total size of all documents that may be uploaded, it is possible for one document to fail to upload but others to successfully upload. An example of this is shown below. Even though the first file failed to upload because of its size, the remaining files successfully uploaded. Failing to upload a document does not stop uploading of additional documents.

File	Size	Comments
2016-02-03 DL435.pdf	816487	
A4D3289.pdf	30469	
BL224-73.pdf	271067	

Send Status

Submitting ROC request... **succeeded.**

Sending file 2016-02-03 DL435.pdf... **failed.**

VAL-16 - All documentation (including LOA) must not exceed 750kb. VAL-12 - Message size is over 800kb.

Sending file A4D3289.pdf... **succeeded.**

Sending file BL224-73.pdf... **succeeded.**

All uploads completed.

Dismiss



The **Dismiss** button is inactive while data is being sent to SMS/800. The button will become active when all messages have completed. Leaving this screen before all messages have been sent to SMS/800 will cause the remaining messages to fail to be sent. When the bold message **All uploads complete.** appears the popup may be dismissed.

Generating a LOA File

To create a LOA document, select the **Generate LOA** button. The **Create a New LOA File** dialog will appear, as shown below.

Create a new LOA File

Customer Name	
Authorized Customer Contact	
Contact Title	
Company Address1	
Company Address2	
City	
State	
Zipcode	
Authorized Customer Phone	
Authorized Customer Extension	
Authorized Customer Fax	

An entry is required for all fields except **Company Address2**, **Authorized Customer Extension**, and **Authorized Customer Fax**.

Click on **Create File** to send request to generate the LOA to SMS/800.

After a successful request, a new tab in the browser appears displaying the newly created LOA document. This file can be downloaded, signed, and saved. Then browse and select the saved document into the **LOA File** field.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **ROC Submit Request Preferences** for details on customizing this screen.

This function allows you to view and manage **ROC Authorization Requests**.

In the menu frame, select the **ROC Mgmt** link located in the **Number Admin** section of the menu. The screen is divided into three main areas. The top area allows you to specify the search criteria. This section appears as follows:

ROC Management

Entity: All ▾ Toll Free Number: Type: Incoming ▾ Start Date/Time: 03/09/21

Resp Org: Status: All ▾ Progress: Open ▾ End Date/Time:

Check Out State: Both ▾ Checked Out By: gaf Reason: All ▾

TxnID:

Retrieve Retrieve All Create Delimited List Reset Sort by: Newest Date ▾

The following is a description of the search criteria:

Field	Description
Entity	search for requests limited to one of your SMS/800 Entities .
Toll Free Number	search for requests involving a particular number.
Type	search for Incoming or Outgoing requests.
Resp Org	search for requests in the specified RespOrg . The Resp Org specified must be in the Entity specified, unless the Entity is <i>All</i>
Status	search for numbers whose status matches the selected value.
Progress	search for Open , Closed or <i>All</i> requests. The Progress field has a default which is controlled by a per User or per Company preference. See Customization , below, for how to modify preferences.
Start Date/Time - End Date/Time	search for requests whose submitted date falls within the given date range. Either value may be omitted to select numbers with status dates after or before a given value. The Start Date/Time field has a default which is controlled by a per User or per Company preference. See Customization , below, for how to modify preferences.
Check Out State	search for <i>Checked Out</i> , <i>Not Checked Out</i> , or <i>Both</i> requests.
Checked Out By	the 8MS user id when specifying a Check Out State of <i>Checked Out</i> .
Reason	search for numbers whose decline reason code matches the selected value.
TxnID	search for the ROC transaction with this TxnId .

If no start date or end date are provided, all ROC requests will be returned, including old, completed requests. This could result in retrieving thousands of requests.

Once all search criteria have been specified, the search is initiated with one of the following buttons:

Retrieve retrieves all numbers matching the search criteria. The numbers are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves and displays all numbers matching the search criteria. The resulting numbers are not grouped into pages.

The **Retrieve** and the **Retrieve All** results appear in the lower frame as shown in the following:

First		Previous 15		Records per Page 15		Set	Revert	Hide Filters	
Record(s): 16 to 30 of 33		Page 1 2 3 of 3		Next 3		Last			
Entity	Created by	Submitter Resp Org	New Resp Org	Submitted Date	Due Date	# Count			
AR	--	ART01	ART34	03/28/17 01:58P	03/30/17 01:58P	1			
AR	--	ART01	ART34	03/28/17 01:58P	03/30/17 01:58P	1			
AR	--	ART01	ART34	03/28/17 01:56P	03/30/17 01:56P	1			
AR	--	ART01	ART34	03/28/17 01:56P	03/30/17 01:56P	1			
H AR	gaf	ART01	ART01	03/28/17 12:05P	03/30/17 12:05P	1			
H AR	gaf	ART01	ART01	03/28/17 10:16A	03/30/17 10:16A	4			
AR	--	ART01	ART01	03/28/17 10:12A	03/30/17 10:12A	2			
AR	--	ART01	ART01	03/28/17 10:04A	03/30/17 10:04A	3			

When records are displayed using either **Retrieve** or **Retrieve All**, the **Sort By** drop-down is used to control the order of the results. By default, results are ordered by Resp Org, then submitted Date/Time.

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the **Data Lists** section of the user guide.

Request Detail

You can click on any column of a request listed to obtain detail about that request. The detail is displayed in the bottom area as shown in the following image:

Submitter Name: Steve-YH Levinn	Submitter Company: theBestNumbers.com
Submitter Phone: 732-302-0222	Submitter Email: roc@csfcorp.com
Submitter Resp Org: YHN01	Submitted Date: 11/06/18 08:51A
New Resp Org: YHN02	Due Date: 11/08/18 08:51A
LOA Document: Gimmie da numba.pdf	
Notes:	
Other Documentation:	
Select All	Unselect All
Check Out	Pending Approve
Approve	Cancel Pending Approve
Decline...	Create Number List

Dialed #	Processed Date/Time	Controlling Resp Org	Status	Reason	Notes
☐ 844-822-2945		ART19	Pending		

A single request shows the information entered by the requesting Resp Org on the **ROC Submit Request** screen.

Any documents that were uploaded will appear in the **LOA Document** and **Other Documentation** fields. All documents appear as links. Clicking on a document will cause your browser to open the document in your standard way, depending on your operating system and browser settings. Additional documents may be added to this request if necessary; this is discussed below, in the section *Managing a Request*.

Beneath the request detail is a list of all toll-free numbers that were included in this request. Immediately above the list of numbers are a set of buttons that allow you to modify this request; this is discussed below, in the section *Managing a Request*.

The set of buttons available in the detail changes depending on whether the request is Incoming or Outgoing. The above screenshot shows the detail for an Incoming request. Below is a screenshot of an Outgoing request.

Submitter Name: Steve-YH Levinn
 Submitter Phone: 732-302-0222
 Submitter Resp Org: YHN01
 New Resp Org: YHN02

Submitter Company: theBestNumbers.com
 Submitter Email: roc@csfcorp.com
 Submitted Date: 11/06/18 08:59A
 Due Date: 11/08/18 08:59A

LOA Document: Gimmie da numba.pdf

Notes:

Other Documentation: Add Document...

Select All Unselect All Remove Dialed #s Cancel Request Create Number List

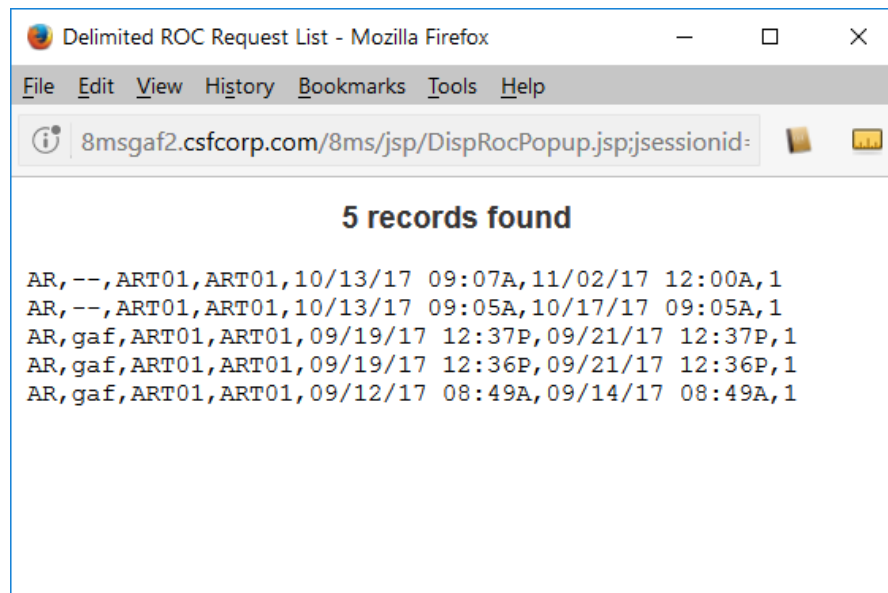
	Dialed #	Processed Date/Time	Controlling Resp Org	Status	Reason	Notes
☐	844-822-2945		ART19	Pending		

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See [Shortcuts](#) for details.

Alternate Result Format

[Create Delimited List](#) retrieves all ROC requests matching the search criteria. Instead of displaying results in the bottom frame, a popup is produced containing the retrieved data in a comma-separated format. The popup is depicted below:



This format, useful for import into a spreadsheet for example, may be saved as a local file or copied and pasted into an application.

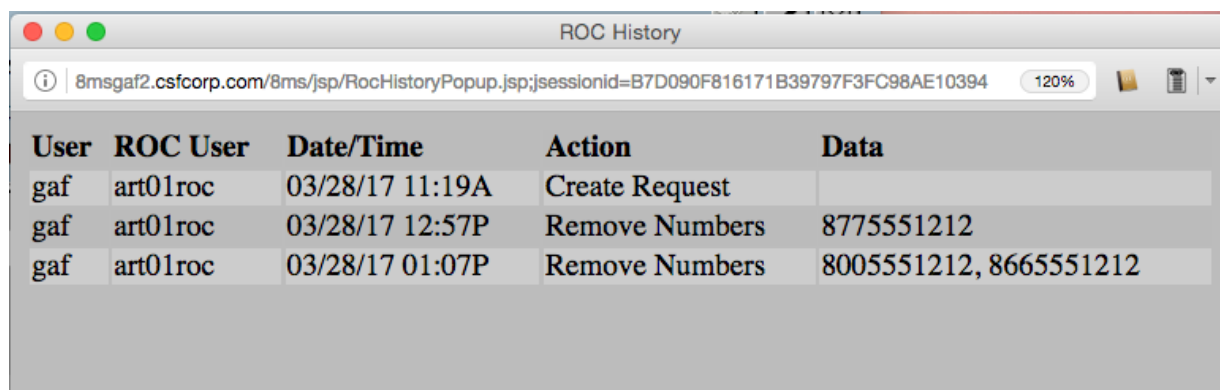
ROC Request History

While viewing the detail of a specific request shows the status of each individual number, it does not show what 8MS user approved/declined numbers in an incoming request or removed numbers from an outgoing request. To aid in tracking 8MS user activity on ROC requests, in addition to using the [Activity Log](#), ROC transactions executed on 8MS provide additional activity logging. This activity may be seen by clicking on the  (ROC History) button on the far left of the list of requests.



ROC History will only be available if an 8MS user made the request on this platform. It will not show activity by users on the Somos ROC platform, nor will it show activity by the other Resp Org company.

When clicking on the ROC History button, a popup will appear with the history of this ROC request, as shown in the example below.



The screenshot shows a web browser window titled "ROC History". The address bar displays the URL: 8msgaf2.csfcorp.com/8ms/jsp/RocHistoryPopup.jsp;sessionId=B7D090F816171B39797F3FC98AE10394. The page contains a table with the following data:

User	ROC User	Date/Time	Action	Data
gaf	art01roc	03/28/17 11:19A	Create Request	
gaf	art01roc	03/28/17 12:57P	Remove Numbers	8775551212
gaf	art01roc	03/28/17 01:07P	Remove Numbers	8005551212, 8665551212

Managing a Request

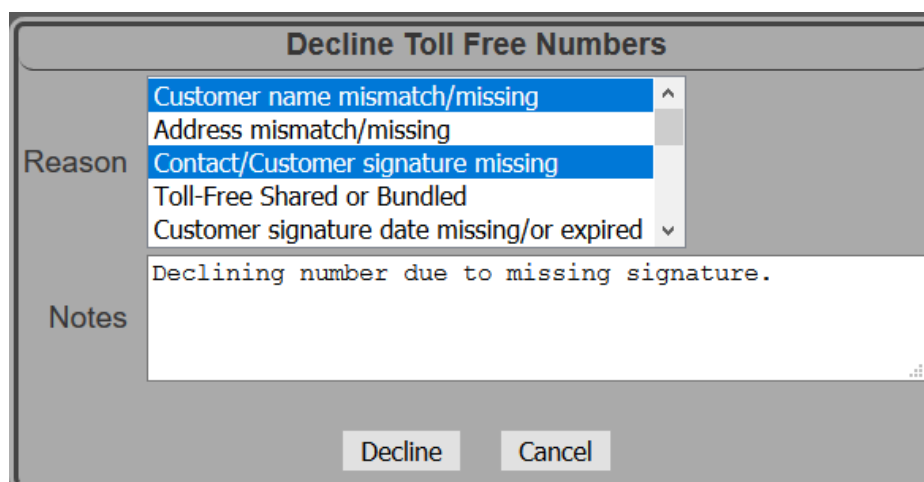
After selecting a specific request from the list of requests, there are several actions that may be performed on that request. As mentioned above, the actions available depend on whether this request is Incoming or Outgoing; the appropriate buttons will appear depending on the request type. Incoming requests provide **Approve**, **Pending Approve**, **Cancel Pending Approve**, and **Decline** buttons. Outgoing requests provide **Add Document**, **Remove** and **Cancel** buttons.

Approving or Declining Incoming Requests

An Incoming request is one that was created by another Resp Org and is directed at your Resp Org. Users in your Resp Org have the ability to approve or decline one or more toll-free numbers in the request. To do this, select the checkbox to the left of a toll-free number and then click the **Approve** or **Decline** button. It is not necessary to approve/decline toll-free numbers one at a time; you may select as many numbers as you wish prior to clicking the **Approve** or **Decline** button.

In addition to the **Approve** button there is also a **Pending Approve** button. Performing a pending approve means that the request should be sent to SMS/800 and stored there until the **Due Date** of the request has been reached. At that point, the request will automatically be approved. Selecting the **Cancel Pending Approve** button tells SMS/800 to cancel a pending approve. This may only be done if the due date has not yet been reached.

Additional information is needed when declining numbers. Clicking on the **Decline** button will display the **Decline Toll Free Numbers** dialog as shown below.



The screenshot shows a dialog box titled "Decline Toll Free Numbers". It has two main sections: "Reason" and "Notes".

Reason: A list box with the following options: "Customer name mismatch/missing", "Address mismatch/missing", "Contact/Customer signature missing", "Toll-Free Shared or Bundled", and "Customer signature date missing/or expired". The "Contact/Customer signature missing" option is currently selected.

Notes: A text area containing the text: "Declining number due to missing signature."

At the bottom of the dialog are two buttons: "Decline" and "Cancel".

Select one or more **Reasons** for declining the numbers.

Notes are required to further support the reason.

Modifying Outgoing Requests

An Outgoing request is one that was created by your Resp Org, and is directed at another Resp Org. Users in your Resp Org have the ability to add documents or remove numbers from the request.

To add a document, select the **Add Document** button. The **Upload ROC Document** dialog will appear, as shown below.

Click on the **Browse** button and a standard file selection popup will appear. Select the document you want to add. The file name will appear on the **Upload ROC Document** popup along with the size of the file. A **Comments** field appears below this. Comments are required as they aid in identifying how that file supports the authorization request. When done, click on the **Upload Document** button. The document will be sent to SMS/800.

To remove numbers from a request, select the checkbox to the left of a toll-free number and then select the **Remove** button. It is not necessary to remove toll-free numbers one at a time; you may select as many numbers as you wish prior to selecting the **Remove** button. After selecting the **Remove** button, the request will be sent to SMS/800.



The Somos ROC System does not actually remove numbers from a request. Instead, it marks those numbers as Declined, with a Reason of *Auto-rejected by Submitter*.

To completely cancel a request, select the **Cancel** button. This is equivalent to selecting all the numbers in this request and selecting the **Remove** button.

Checking Requests In and Out

It is possible to check out a ROC request to inform other users that you are currently working on this request. Doing this makes it easier for multiple users working on requests to only view requests that are not currently being worked on by other users. This is typically used for *Incoming* requests.

The filter section of this screen, shown at the top of this page, provides a **Check Out State** drop-down list and **Checked Out By** field. To view only those requests not currently checked out, select the *Not Checked Out* value in the **Check Out State** list and clear the **Checked Out By** field. Now specify other filter values as needed. Only those requests not currently checked out by other users will be shown. This is indicated in the middle frame by an icon of an open lock: .

To let other users know that you are currently working on a request, after filtering and then selecting a single request in the middle frame, select the **Check Out** button. The button label will change to **Check In**, the middle frame will now show a closed lock: , and the bottom frame the name of the user that has the request checked out.

When you have finished processing a request, select the **Check In** button and the request will be checked back in.

To avoid keeping other users from working with a request, the checked out state does not actually prevent users from viewing or editing a request. Doing so could create potential problems. For example, if a user locked a request and then got side-tracked with other customer support issues, it would be impossible for any other user to finish this request. To avoid this situation, it is possible for one user to check out a request and another user to check it back in, so all users in that company with access to ROC screens have control of all requests.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [ROC Management Preferences](#) for details on customizing this screen.

This function allows you create customer records for one or more toll-free numbers by copying the data from an 8MS Routing Set or from an existing customer record. If the source is a CAD record or 8MS Routing Set the CAD, CPR and LAD data is copied; if the source is a PAD record then PAD data (including the SMS Template name) is copied. All information will be copied unchanged, with the exception of the toll free number. The destination toll free number will be substituted as appropriate. (To create new (or *custom*) routing, use the **Record Management SMS/800 CAD** or **SMS/800 PAD** screen.)



If the source record is a CAD record or an 8MS Routing Set then the Copy Record will create a new CAD record for each number. If the source record is a PAD record or an SMS Template then the Copy Record will create a new PAD record for each number.

Additionally, if the source record is a PAD record then the name of the SMS Template pointed at by this record will appear below the source record **Date/Time**.

In the menu frame, select the **Copy Record** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:

The screenshot shows the 'Copy Record' form with the following fields and controls:

- Source Record**
 - SMS Template: dropdown menu with a green checkmark icon.
 - 8MS Routing Set: dropdown menu with a blue checkmark icon.
 - Toll Free Number: text input field with a green arrow icon.
 - Date/Time: dropdown menu.
- Destination Number(s)**
 - Toll Free Number: text input field with a green arrow icon.
 - Number List: dropdown menu with a red checkmark icon.
 - Numbers: large text area for listing destination numbers.
 - SMS Template: dropdown menu with a green checkmark icon.
 - 8MS Routing Set: dropdown menu with a blue checkmark icon.
 - Date/Time: text input field with 'NOW' selected.
 - ☐ High Priority: checkbox.
- Buttons**
 - Send: button.
 - Reset: button.

To copy a record you must specify a Source Record (to copy from) and the Destination Number(s) (to copy to).



Some of the fields shown above may not be available. Source and Destination fields available on this screen are determined by your login permissions.

To specify the Source Record, you can:

- Select an 8MS Routing Set from the **8MS Routing Set** drop-down list.
- Select an SMS Template from the **SMS Template** drop-down list.
- Enter a toll-free number in the **Toll Free Number** field.

For more information on 8MS Routing Set lists and the **Show All** button, see the [8MS Routing Set](#) overview.



When copying from a toll-free number, hit the **TAB** key after typing in the number. The **Date/Time** drop-down list will be filled with the known records for that number. A record will be automatically selected. The record selected is chosen in the following order: ACTIVE, SENDING, most recent PENDING, or most recent OLD. If you wish, you may select a different customer record from the list.

The information to be sent will come from the selected 8MS Routing Set, SMS Template, or customer record of the specified toll free number.

To specify the Destination Number(s), you can:

- Enter a single toll free number in the **Toll Free Number** field.
- Select a pre-defined list of toll free numbers from the **Number List** drop-down.
- Enter a list of white space (space or new-line) separated numbers into the **Numbers** field.
- Select an 8MS Routing Set from the **8MS Routing Set** drop-down list.
- Select an SMS Template from the **SMS Template** drop-down list.

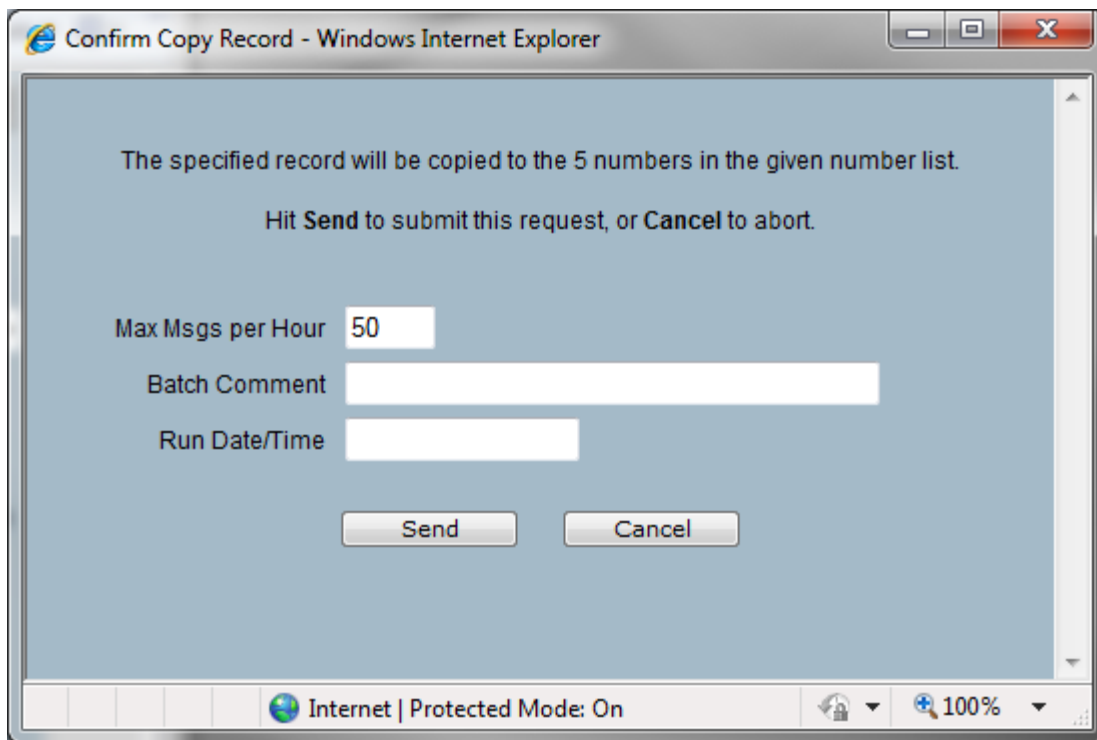
The format of a number in the **Toll Free Number** and **Numbers** fields is 10 digits with or without dashes (for example: 8005551212 or 800-555-1212).

In the **Date/Time** field, enter the effective date and time at which the customer record(s) will become active. The format of this field is MM/DD/YY HH:MMA/Z (or P/Z) or the keyword NOW (which is pre-filled as the default).

Next to the **Date/Time** field is the **High Priority** checkbox. This checkbox provides access to the SMS/800 *High Priority Update* feature. Selecting this option will tell SMS to place this customer record at the front of the SCP queue. Only a small number of these updates can be done each day. After a high priority change is sent, check the [Activity Log](#) to see how many such updates remain for the current day.

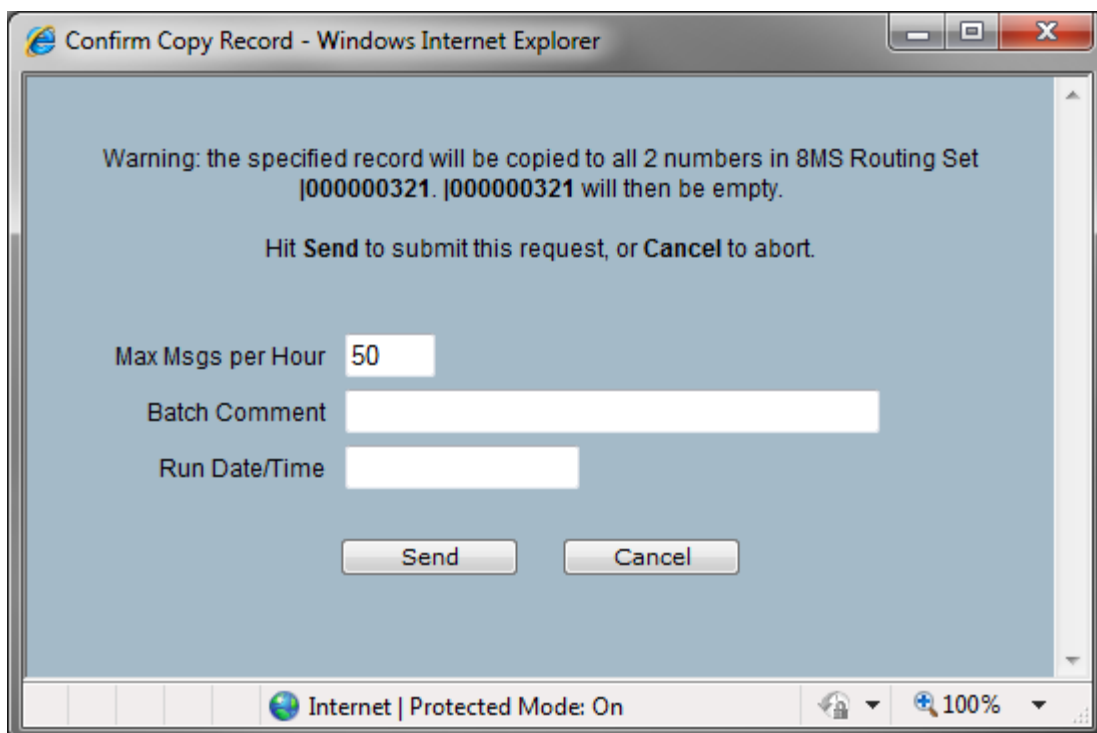
Select the button. If a single destination number was specified, a message is immediately sent to SMS/800, and the response frame indicating the status of the request.

If multiple destination numbers were specified (i.e., by selecting a **Number List** or putting a value in the **Numbers** field), a confirmation window will appear. For example, copying an 8MS Routing Set to a list of numbers:



Since multiple numbers are involved, this copy record operation will be sent as a batch operation. The confirmation popup allows an optional comment and/or date/time for the batch. For more information on batch operations, see [Number Administration](#).

If an 8MS Routing Set is selected as the destination a different confirmation window appears:



Selecting an 8MS Routing Set as the destination means that all the numbers currently in the destination 8MS Routing Set will be re-routed. This may be desirable, for example, when an 8MS Routing Set has been changed, and the destination 8MS Routing Set is the old version (see **Changing 8MS Routing Sets** in the **8MS Routing Set Management** section).

If an SMS Template is selected as the destination then another different confirmation window appears:

Selecting an SMS Template as the destination means that all the numbers currently in the destination SMS Template will be re-routed. Any numbers not on 8MS at the time the Copy Record is done will not be re-routed.

Use the **Max Msgs per Hour** field to limit the number of messages per hour being sent to SMS/800. This is intended to help you avoid exceeding the per Resp Org CPU percent allocation defined by SMS/800. Note that this field may be given a per User or per Company default. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **MaxMsgsPerHour** under **User Interface Preferences** for details on customizing this field.

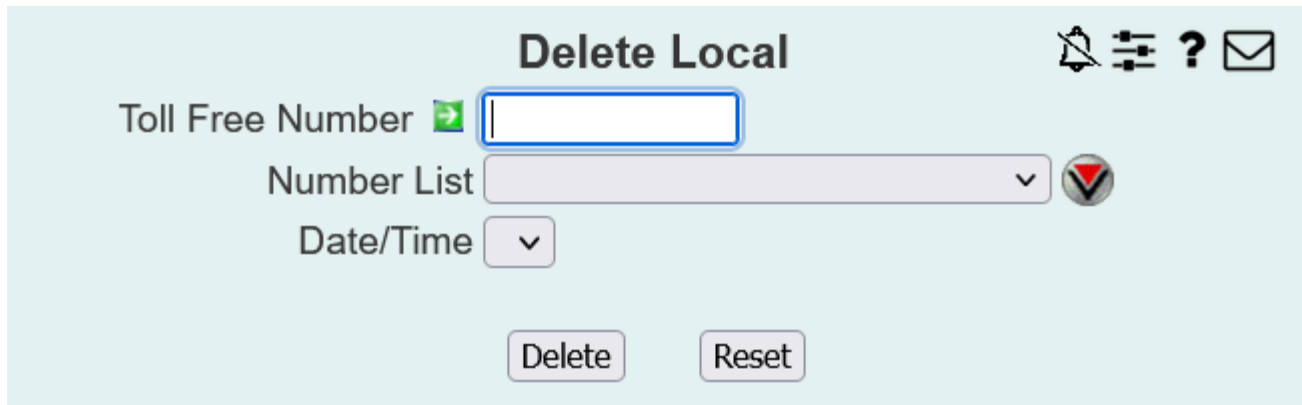
Use the **Comments** field to enter optional notes that will appear in the **Batch Log**.

The **Run Date/Time** field may be used to specify the date and time when the batch change will be sent. If left blank, the batch job will run ASAP.

Once you are satisfied that the described change is correct, enter your optional comment, run date/time and max msgs values, and confirm the batch operation by hitting the **Send** button. The progress of the batch job can then be tracked using the **Batch Log** screen.

This function allows you to delete the local information associated with one or more toll free numbers. Information is deleted from the local 8MS database only; no messages are sent to SMS/800. This function is generally not needed, but is sometimes useful to ensure the state of the 8MS database matches that of SMS/800.

In the menu frame, select the **Delete Local** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



Delete Local

Toll Free Number 

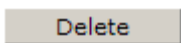
Number List  

Date/Time 

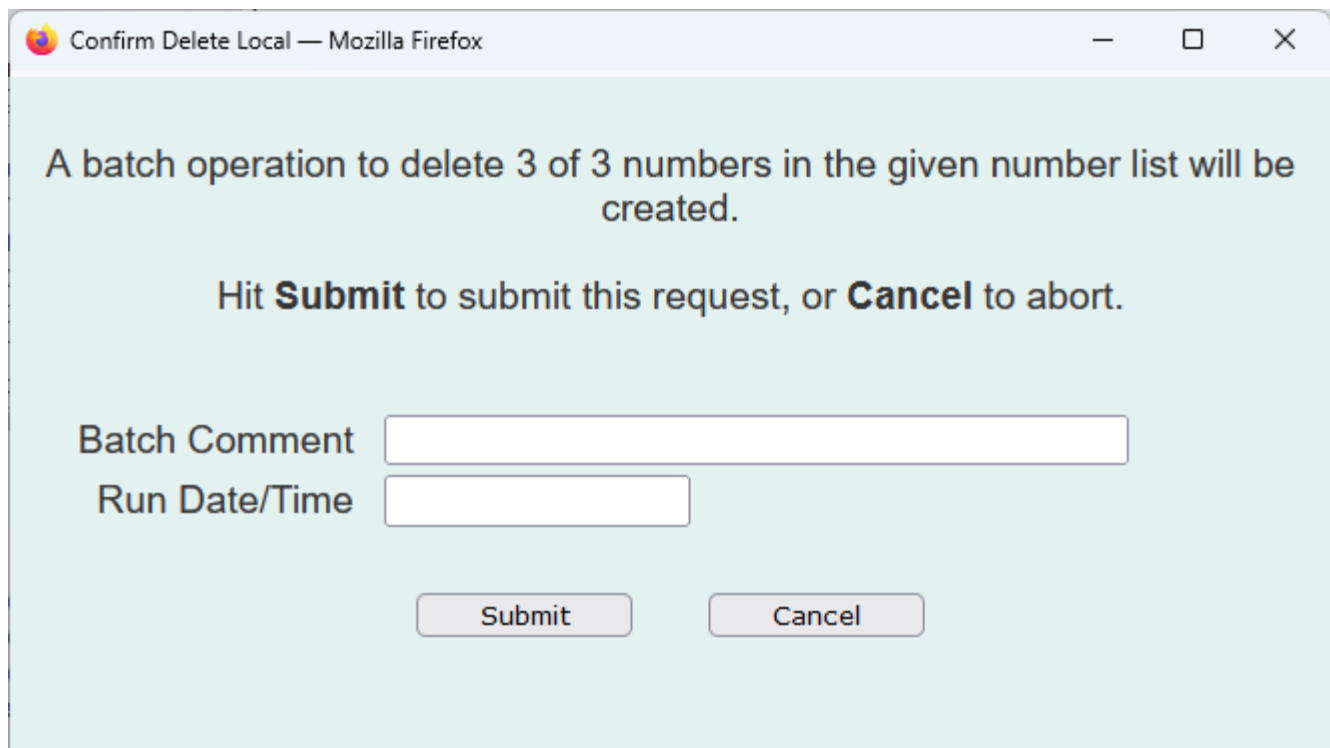
Delete **Reset**

To delete local data, you have the option to enter a single toll free number by using the **Toll Free Number** field, or to select a list of numbers by using the **Number List** drop-down. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212). If only a toll free number is specified, the number, all customer records, and all complex routing plans associated with those records will be deleted.

You also have the option to delete only particular customer record by using the **Date/Time** drop-down. The toll free number is not deleted, and only the complex routing plan associated with the selected record (if any) is removed.

Select the  button to complete the request.

If a number list was specified, then the Delete Local operation will be performed as a batch job. The following pop-up window will appear:



Confirm Delete Local — Mozilla Firefox

A batch operation to delete 3 of 3 numbers in the given number list will be created.

Hit **Submit** to submit this request, or **Cancel** to abort.

Batch Comment

Run Date/Time

If desired, enter a comment or run date/time and confirm the batch operation by hitting the

button. The progress of the batch job can then be tracked using the [Batch Log](#) screen.

This function allows you to delete a single customer record for a toll free number. Only non-ACTIVE records can be deleted from SMS/800.

In the menu frame, select the **Delete from SMS** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:

To delete the SMS/800 record, enter a toll free number in the **Toll Free Number** field. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

After entering a number in the **Toll Free Number** field hitting the TAB key will populate the **Date/Time** drop-down list with all known date/time records. Select the effective date/time of the customer record you want to delete from the **Date/Time** drop-down list, or type a date time in the text field below, labeled **(select or enter)**. The format of this field is MM/DD/YY HH:MMa/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted.

Select the **Send** button. A message will appear in the response frame indicating the status of the request.

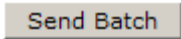
SMS/800 has an unusual behavior for numbers in the *Assigned* state that should be explained. To understand this behavior, you must first know that when a number is reserved, it has a *Reserved Until* date associated with it. If the number has not had any records scheduled or activated by the time the *Reserve Until* date is reached, the number is returned to the spare pool.

Now consider the case where a number is in the *Assigned* state and has a single *Pending* record. When you request to delete that *Pending* record, if the *Reserve Until* date has not passed, the record is deleted and the number is returned to the *Reserved* state.

If the *Reserve Until* date has passed, the delete request will be rejected with an error of "USE DCSN=Y". The DCSN flag allows an MGI client to force SMS/800 to delete a record in the case where the *Reserve Until* date is in the past. *Deleting the record with DCSN set to Y has an unexpected side-effect of returning the number to the spare pool.* 8MS has made a conscious decision to never set this flag, so a number is only spared when the controlling Resp Org chooses to spare that number.

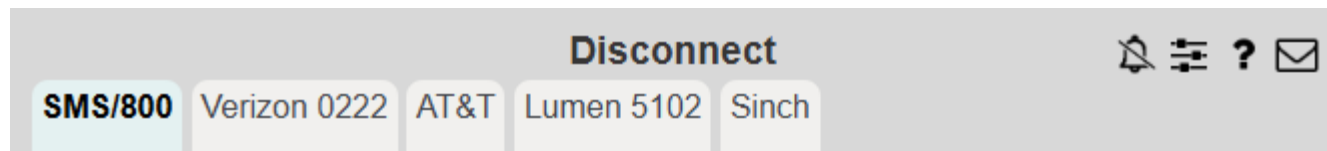
Batch Record Delete

This function allows you to delete a customer record from a list of toll free numbers. An attempt will be made to delete the same record from each number (i.e., the record specified in the **Date/Time** field as described above). Requests for numbers that do not contain the specified record will fail.

Select the  button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This screen allows you to disconnect toll-free numbers for SMS/800 and all supported carriers.

To access **Disconnect**, select the **Disconnect** link located in the **Number Admin** section of the menu. After accessing this screen, it is necessary to specify whether you will be working with an SMS/800 or carrier number. This is done by selecting the appropriate tab. (For more information on SMS/800 and carrier tab behavior, see [SMS/800 and Carrier Tabs](#).) Below is a screen shot of a typical set of tabs for **Disconnect**.



To view documentation for each of the tabs see the sections indicated below.

- [Disconnect: SMS/800](#)
- [Disconnect: AT&T](#)
- [Disconnect: Lumen-5102](#)
- [Disconnect: Verizon 0222](#)
- [Disconnect: Sinch](#)

This screen allows you to disconnect toll-free numbers for SMS/800.

To access the **SMS/800** tab of **Disconnect**, select the **Disconnect** link located in the **Number Admin** section of the menu and then select the **SMS/800** tab. The following will appear in the workspace frame:

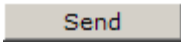
The screenshot shows a light blue form with the following fields and buttons:

- Toll Free Number**: A text input field with a green arrow icon to its right.
- Date/Time**: A text input field containing the value "NOW".
- High Priority**: A checkbox.
- End Intercept Date**: A text input field containing the value "02/11/20".
- Generate End Intercept Days**: A text input field containing the value "120".
- Generate Date**: A button.
- Referral Option**: A checkbox.
- Send**: A button.
- Send Batch**: A button.
- Reset**: A button.

Field	Description
Toll Free Number	Enter the number you wish to disconnect. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).
Date/Time	The value entered will be the effective date/time of the disconnect record. When this date/time is reached, the number will go to the DISCONNECT status. The keyword NOW can also be used to specify an immediate disconnection.
End Intercept Date	This is date on which the number will go to the TRANSITIONAL status. The keyword NOW will cause the number to go TRANSITIONAL as soon as the effective date/time of the disconnect record is reached. Specifying NOW for both Date/Time and End Intercept Date will cause the number to immediately go to the TRANSITIONAL status.
Generate End Intercept Days	Rather than having to manually calculate the End Intercept Date , the user may specify the number of days from today. Clicking on the Generate Date button will populate the End Intercept Date based on the value entered in the Generate End Intercept Days field.
High Priority	This checkbox provides access to the SMS/800 <i>High Priority Update</i> feature. Selecting this option will tell SMS to place

this customer record at the front of the SCP queue. Only a small number of these updates can be done each day. After a high priority change is sent, check the **Activity Log** to see how many such updates remain for the current day.

Referral Option This checkbox controls whether or not calls to the disconnected number will be delivered to the carrier (checked), or SMS/800 will play a disconnect announcement (unchecked).

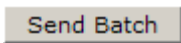
Select the  button. A message will appear in the response frame indicating the status of the request.



If the Active record for this toll-free number is a PAD record, when the disconnect request is sent to SMS/800, SMS/800 incorrectly replaces the PAD record with a CAD record. This means that until the end-intercept date is reached, if the routing for the SMS Template previously pointed at by this toll-free number is updated, the changes made to the SMS Template will not be reflected in this toll-free number. As a result, it is possible that calls will not route correctly for this toll-free number.

Batch Disconnect

This function allows you to disconnect a list of toll free numbers. All disconnect requests will have the same effective date/time, end intercept, and referral options, as specified in the fields discussed above.

Select the  button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This screen allows you to disconnect toll-free numbers for AT&T.

To access the **AT&T** tab of **Disconnect**, select the **Disconnect** link located in the **Number Admin** section of the menu and then select the **AT&T** tab.

The following will appear in the workspace frame:

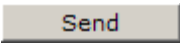
The screenshot shows a web form for disconnecting AT&T toll-free numbers. The form is organized into two main columns. The left column contains fields for Toll Free Number, Contact Name (pre-filled with 'Gerry Finkel'), Order Type (pre-filled with 'IPTF360'), Profile (a dropdown menu), Enterprise ID, MCN (a dropdown menu), APN, and Routing Number. The right column contains fields for Contact Phone (pre-filled with '732-356-6999'), Client Order #, Account Type, LSO, RAO, and Group Size. At the bottom of the form are three buttons: 'Send', 'Send Batch', and 'Reset'.

Like the **Record Management: AT&T** screen, the **Disconnect: AT&T** screen provides an **AT&T Profile** to speed up the disconnect process. In the case of a disconnect, only the fields necessary for a disconnect are sent to AT&T.

The table below describes the fields for this section.

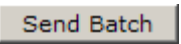
Field	Description
Toll Free Number	The number to be disconnected. This is a required field unless a batch is being sent. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).
Contact Name	The person to contact if AT&T has questions about this record activation. Its maximum size is 30 characters. If the <i>ContactName</i> User/Company Preference is set then this field will be pre-populated.
Contact Phone	The phone number of the contact person. If the <i>ContactPhone</i> User/Company Preference is set then this field will be pre-populated.
Client Order #	The AT&T order associated with the number(s) being activated/changed. Its maximum size is 21 characters.
Order Type	The type of service being configured. Currently only a single service type is available, so this may not be changed <i>IPTF360</i> .

Profile	The profile to use in your <i>Disconnect</i> action.
Enterprise ID	The Ericsson Account Number for this Toll-Free Number.
Account Type	The account type is associated with a profile and may not be modified. When provisioning Toll-Free Numbers, if a profile is not selected, the account type is not provisioned.
MCN	The AT&T Master Customer Number for this Toll-Free Number.
LSO	The Local Serving Office for this Toll-Free Number.
APN	The Action Point Number for this Toll-Free Number.
RAO	The Revenue Accounting Office for this Toll-Free Number.
Routing Number	The routing number for this Toll-Free Number.
Group Size	The group size for this Toll-Free Number.

To disconnect a single number, populate the appropriate fields and then select the  button. A message will appear in the response frame indicating the status of the request.

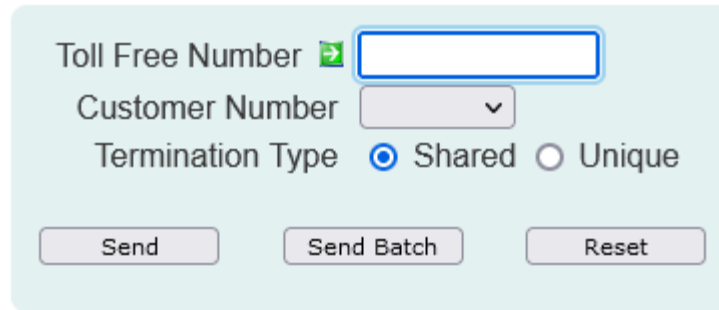
Batch Disconnect

This function allows you to disconnect a list of toll free numbers. All disconnect requests will have the same set of data specified in the fields discussed above.

Select the  button. The Batch Popup will appear. See [Batches](#) in the [Common Features](#) section for details on the Batch Popup.

This screen allows you to disconnect toll-free numbers for Lumen-5102.

To access the **Lumen-5102** tab of **Disconnect**, select the **Disconnect** link located in the **Number Admin** section of the menu and then select the **Lumen-5102** tab. The following will appear in the workspace frame:



Toll Free Number 

Customer Number

Termination Type ☒ Shared ☐ Unique

The table below describes the fields for this section.

Field	Description
Toll Free Number	The number to be disconnected. This is a required field unless a batch is being sent. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).
Customer Number	The Lumen-5102 customer number associated with the number(s) being disconnected.
Termination Type	The Lumen-5102 termination type associated with the number(s) being disconnected.

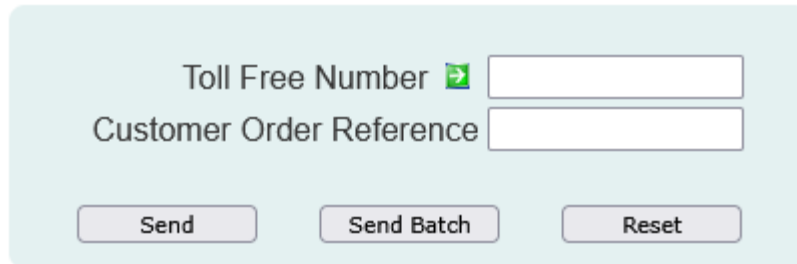
To disconnect a single number, populate the **Toll Free Number** and **Customer Number** fields, select the **Termination Type** and then select the button. A message will appear in the response frame indicating the status of the request.

Batch Disconnect

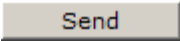
This function allows you to disconnect a list of toll free numbers. Enter the **Customer Number**. Now select the button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This screen allows you to disconnect toll-free numbers for Sinch.

To access the **Sinch** tab of **Disconnect**, select the **Disconnect** link located in the **Number Admin** section of the menu and then select the **Sinch** tab. The following will appear in the workspace frame:

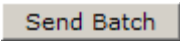
A screenshot of a web form for disconnecting toll-free numbers. The form is light blue and contains two input fields: 'Toll Free Number' with a green arrow icon and 'Customer Order Reference'. Below the fields are three buttons: 'Send', 'Send Batch', and 'Reset'.

To disconnect a toll-free number, enter the **Toll Free Number** and, optionally, the **Customer Order Reference**.

Select the  button. A message will appear in the response frame indicating the status of the request.

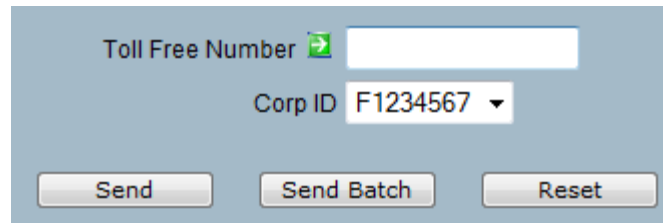
Batch Disconnect

This function allows you to disconnect a list of toll free numbers. All disconnect requests will have the same **Account Number** and **Service Type**.

Select the  button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This screen allows you to disconnect toll-free numbers for Verizon 0222.

To access the **Verizon 0222** tab of **Disconnect**, select the **Disconnect** link located in the **Number Admin** section of the menu and then select the **Verizon 0222** tab. The following will appear in the workspace frame:



Field	Description
Toll Free Number	Enter the number you wish to disconnect. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).
Corp ID	Select the Verizon Corporate Identifier with which this number is currently associated.

Select the **Send** button. A message will appear in the response frame indicating the status of the request.

Batch Disconnect

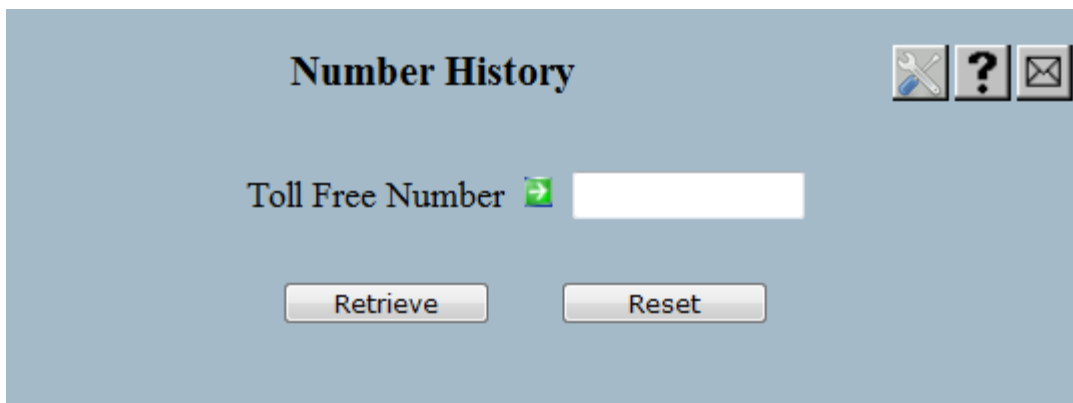
This function allows you to disconnect a list of toll free numbers. All disconnect requests will have the same Corp ID, as specified in the field discussed above.

Select the **Send Batch** button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

SMS/800 maintains a database of the change history of all toll free numbers. Any time a change is made, an entry is made noting the date/time of the change, the login ID used to make the change, a RespOrg change that may have resulted, and/or a change to the status of the number. The information in the SMS history database is updated nightly. Thus, a change may take up to a day to be reflected in the history DB.

8MS provides a number of ways to access this information. This section describes a screen that can be used to request the change history of a given number. Also provided are hyperlinks from displayed toll free numbers that will access the number history. Currently, three 8MS screens provide such links: [Search Local Numbers](#), [Search Local Records](#) and [Activity Log](#).

In the menu frame, select the **Number History** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



Enter a value in the **Toll Free Number** field. The format is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

Select the **Retrieve** button. The change history of the given number will appear in the lower part of the screen:

History for 8666006000						
<u>Change Date</u>	<u>Status</u>	<u>Status Change Date</u>	<u>RespOrg</u>	<u>Prev RO</u>	<u>Login ID</u>	<u>Download Date</u>
05/29/2003 10:50:09	WORKING	07/29/2000 18:23:31	ART10	ART01	ART01000	05/30/2003 00:01:00
07/29/2000 18:23:31	WORKING	07/29/2000 18:23:31	ART01		ART01000	03/28/2002 12:56:29
07/29/2000 18:23:27	ASSIGNE	07/29/2000 18:23:27	ART01		ART01000	03/12/2002 21:14:26
07/29/2000 12:01:25	RESERVE	07/29/2000 12:01:25	ART01		ART01000	03/12/2002 21:14:04

This screen allows you create and modify lists of **Numbers**, a set of toll free numbers and **Long Codes**. Number lists are used to implement batch operations (i.e., operations on more than one number). See the **Number Administration Overview** for more information on number lists and batch operations.

The **Number List Administration** screen provides various functionality:

- creating new number lists
- modifying the name or expiration date of existing lists
- modifying the content of existing lists
- searching for a number in lists
- downloading list content to your PC
- deleting a list
- combining two lists
- finding differences between two lists

Each of these functions are described in sections below.

To access **Number List Administration**, select the **Number Lists** link located in the **Number Admin** section of the menu. The screen is divided into two main areas. The top portion is depicted in the following:

This part of the screen is essentially for selecting an existing list, or naming a new one, and indicating the function you wish to perform on the indicated list. The bottom portion of the screen will change depending on the desired function. When **Number List Administration** is first selected, the bottom portion is populating, but is not useful until some selections are made in the top.

We will now describe how the fields and buttons in the top section are used to perform various actions.

Creating a New Number List

To create a new number, select the **or create a new one** checkbox. The name of the new list is entered in the **List Name** field. It can consist of up to 30 alphanumeric characters.

When number lists appear in a drop-down, the list



name, the creator of the list, and the date/time the list was last updated are shown.

The **List Valid Until** field will be pre-populated with a date. On this date, the number list will automatically be deleted. You can change this date, or clear it out, in which case the list will be retained indefinitely. When creating a temporary list that you only need for the current day, you may set the date to any date in the past. The number list will be deleted at the end of the day.



When a number list is deleted, only the association of the name to the numbers is removed. The numbers themselves remain in the system unchanged. It is best to limit the number of number lists retained. Many 8MS screens contain drop-downs of number lists, and initialization of these screen is faster with less number lists.

When the **create a new one** checkbox is select, the bottom section changes to offer one way to define the numbers to be placed in the new list:

The screenshot shows a web interface with a large, empty text box for entering numbers. Below the text box, there is a label 'Save List' followed by a checked checkbox. The entire section is enclosed in a light blue border.

This field, the so-called *whole list box*, allows numbers to either be typed or pasted in. The **Save List** checkbox, checked by default for a new list, means that when the **Update** button is hit, the contents of the field will be placed into the number list (more on **Save List** later).

Because some older web browsers put a limit on the size of the field used for the whole list box, 8MS limits the count of numbers that can be entered in this way. This limit means that another mechanism must exist for creating very large lists. Thus, another way to define the contents of a list is to upload a file of numbers from your PC. There is no limit on the size of an uploaded list, however, practicality generally suggests a limit of around 100,000 numbers per list.

To upload list content from a file, hit the **Upload List** button. The bottom section again changes, presenting the following:

Enter the name of the numbers list file to upload in the **File Name** field below
(or use the **Browse** to locate the file on your machine).
Then press the **Upload File** button.

Please note that Upload only supports plain text files.
File formats such as Microsoft Excel are not supported.

File Name

Using the button, locate the desired file on your machine. The file must be a plain text file, containing numbers separated by white space. The numbers may contain formatting characters (dashes or parenthesis) or simply be 10 digits. After the file has been selected, click the button. The numbers are read from the selected file and placed in the number list. Any duplicate numbers will be removed. There is no need to click the button after uploading from a file. After is clicked, a confirmation popup will appear showing the count of numbers that have been uploaded into the list.

Modifying Existing Lists

After selecting a list from the existing list drop-down, any or all of the following may be changed:

- the name
- the expiration date
- the contents

To change either the name and/or expiration date, update the appropriate field or fields, and hit the button.

There are three means by which the content of an existing list can be changed, by selecting of the first three buttons labeled **Edit**. Each of the methods are described below.

Single Number

If the button is selected, the following will appear on the bottom portion of the screen:

Toll Free Number 

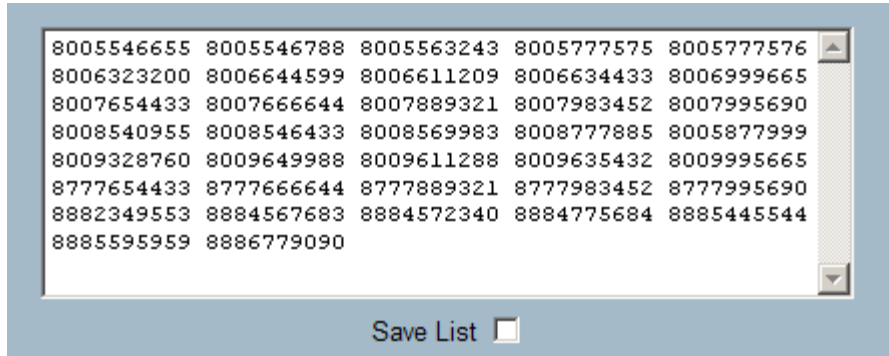
This screen allows single numbers to be added to or removed from the list one at a time. As soon as either the or buttons are clicked, the content of the list is updated.

As an aside, this screen also provides the search capability. After entering a number, select the

button. The **Select an existing list** drop-down will be repopulated with number lists containing the given number. If no such lists exist, the drop-down is left unchanged.

Whole List

If the **Whole List** button is selected, *whole list box* previously discussed is presented. When selected for an existing list, the field will be populated with the list contents:



The screenshot shows a dialog box titled "Whole List" with a text area containing 20 numbers arranged in 4 rows of 5. Below the text area is a "Save List" checkbox, which is currently unchecked.

8005546655	8005546788	8005563243	8005777575	8005777576
8006323200	8006644599	8006611209	8006634433	8006999665
8007654433	8007666644	8007889321	8007983452	8007995690
8008540955	8008546433	8008569983	8008777885	8005877999
8009328760	8009649988	8009611288	8009635432	8009995665
8777654433	8777666644	8777889321	8777983452	8777995690
8882349553	8884567683	8884572340	8884775684	8885445544
8885595959	8886779090			

Numbers can be added or removed by changing the contents of the field. Note that the **Save List** checkbox is unchecked for an existing list. In order to alter the list content with the whole list field, you must check this box, and then hit the **Update** button. The number list content will then be replaced by whatever is in the whole list field.

Upload List

The last method to alter the content of an existing list is to upload new content from a file. Click the **Upload List** button, and the bottom section will change and present the upload screen shown above. Use the procedure previously described for uploading to a new list. When the **Upload File** file button is clicked, the current contents of the selected list will be **replaced** by the content of the selected file. As previously mentioned, there is no need to click the **Update** button after uploading from a file.

Downloading List Content

As you have probably realized, clicking the **Whole List** button after selecting an existing list is one way to examine list content. A second mechanism exists that makes it easier to save the list content to file on your PC. After choosing a list, hit the **Download List** button. A new browser window containing the numbers in the list will be appear. To save the numbers in a text file, select the **Save As** option from the **File** menu. A standard Windows popup will allow you to select a file into which the numbers will be placed.



In most browsers, the **Save as type** option on the **Save As** popup will default to *Web Page* or *HTML Document*. It is best to change this to *Text File*.

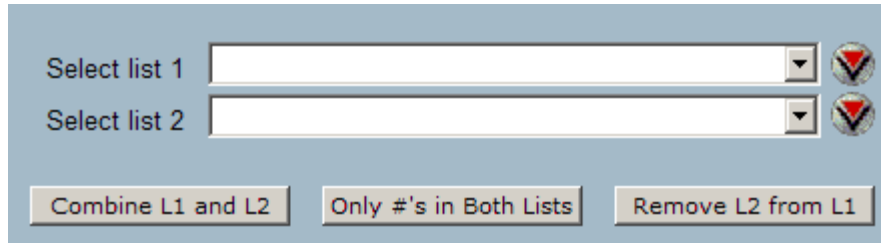
Deleting a List

To delete an existing number list, select it from the drop-down and hit the **Delete** button. After responding affirmatively to the confirmation popup, the number list is removed from the system. Again,

remember that only the number list is removed; the actual numbers and their associated data remain unchanged in the database.

Multi-List Operations

The last function available on **Number List Administration** allows two number lists to be selected, and some basic set operations performed on them. Click the **Multi-List** button, and the following will appear in the bottom section:



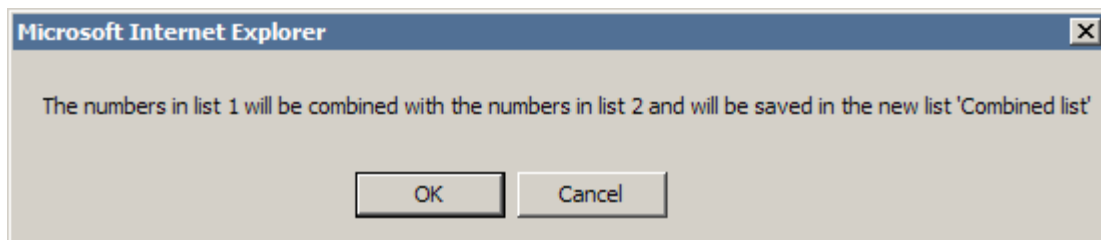
The screenshot shows a web interface with a light blue background. At the top, there are two dropdown menus labeled 'Select list 1' and 'Select list 2'. To the right of each dropdown is a small circular icon with a red checkmark. Below the dropdowns are three buttons: 'Combine L1 and L2', 'Only #'s in Both Lists', and 'Remove L2 from L1'.

Select any two existing lists, then click on one of the three options. The results of the operation are placed in whatever list is indicated in the top portion of the screen. It can be a new list or an existing list. It can even be one of the two lists selected in the bottom section.

The three buttons perform the following operations:

- Combine L1 and L2:** the contents of the two lists are merged, with duplicates removed (i.e., the *union*)
- Only #'s in Both Lists:** the result will be the set of numbers that exist in both lists (i.e., the *intersection*)
- Remove L2 from L1:** the result will be the set of numbers that exist only in the first list

After selecting the desired operation, a popup will appear confirming the operation. For example:



After clicking OK, the results will be placed in the indicated list.

The Number List popup allows creation of number lists from various 8MS screens. It appears as follows:

The count of numbers to be placed into a number list is noted in the middle of the screen. These numbers can be placed into a new list by entering the list name in the field labeled **or enter the name of a new one**. Alternatively, an existing list can be selected from the drop-down. In this case, the contents of the selected list will be replaced.

The **Expiration Date** field indicates the date on which the list will be deleted. If a list has no expiration date, it will be retained indefinitely.

The **Maximum List Size** field has two uses, depending on the state of the **Create Multiple Lists** checkbox.

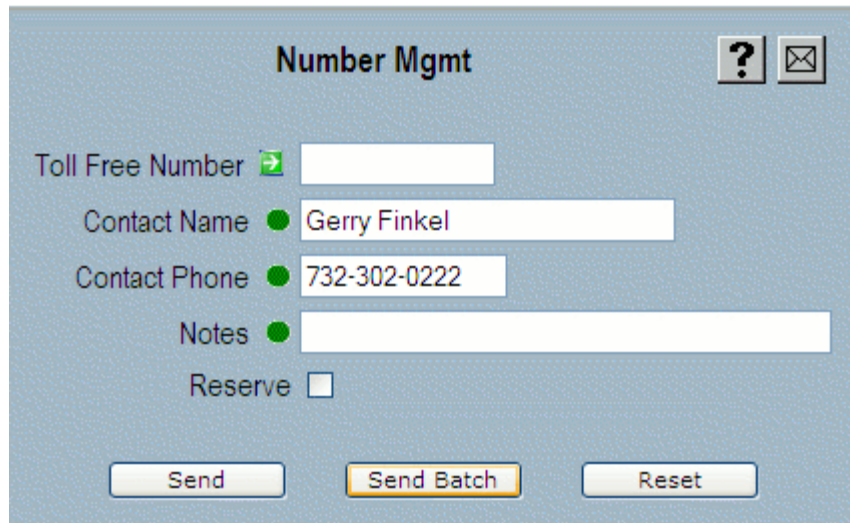
If **Create Multiple Lists** is not checked, then the value of **Maximum List Size** specifies the maximum number of toll free numbers to be placed into the given list. This allows, for example, the user to retrieve many thousands of numbers from a Search Local screen, but only place the first few hundred in a list. Thus, if a value of **100** is entered above, a number list containing 100, not 525, numbers will be the result.

If **Create Multiple Lists** is checked, then the retrieved numbers are placed into one or more lists, each containing no more than the count specified in **Maximum List Size**. This allows, for example, the user split thousands of numbers from a Search Local screen into many small lists. If **Create Multiple Lists** is checked above, and a value of **100** is entered in the **Maximum List Size** field, six number lists will be created (the first five containing 100 numbers, the last, 25). The list names will have a sequence number appended. If the user specifies name of, say, **new numbers**, the actual names created would be **new numbers-1**, **new numbers-2**, etc.

Once the desired number list options are entered, select the **Update** button. The Number List popup window will then be redrawn showing the results of the update request.

This screen provides two primary functions. It allows you to modify the contact information and notes for a toll-free number. It also allows you to reserve a number currently in the *Transitional* state. You can also modify contact and notes information for numbers in any state or reserve *Transitional* numbers for an entire list of toll-free numbers in one operation (see **Batch Number Management** below.)

In the menu frame, select the **Number Mgmt** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



Number Mgmt ? [X]

Toll Free Number 

Contact Name 

Contact Phone 

Notes 

Reserve ☐

To change the contact or notes information for a single toll-free number, enter the number in the **Toll Free Number** field. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212)



Hitting the **TAB** key or clicking outside the **Toll Free Number** field after typing in the number will cause the **Contact Name**, **Contact Phone**, and **Notes** fields to populate with their current values.

Enter the new contact and notes information in the **Contact Name**, **Contact Phone**, and **Notes** fields. If the number is in the *Transitional* state and you want to reserve it again, select the **Reserve** checkbox.

Select the button. A message will appear in the response frame indicating the status of the request.

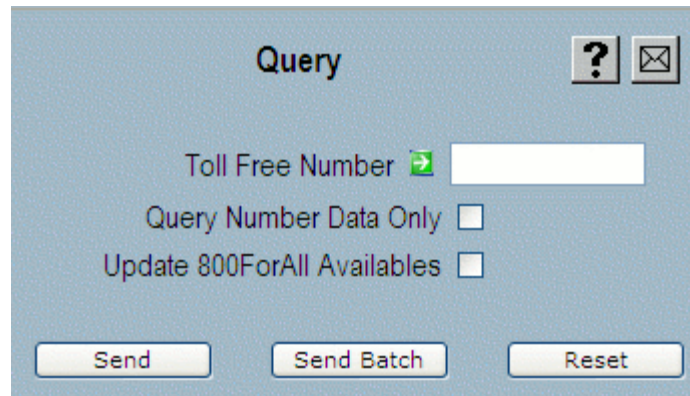
Batch Number Management

This function allows you to change the contact or notes information for a list of toll free numbers in one operation. If the numbers are in the *Transitional* state you can reserve these numbers.

Select the button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This function allows you to query SMS for the status of a particular toll free number. In addition, if customer records exist for the number, their effective date and time, status, and approval status will also be listed. You are also able to query a list of toll free numbers. See **Batch Query** below.

In the menu frame, select the **Query** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



To query a toll free number, enter it the **Toll Free Number** field. The format is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

Select the **Query Number Data Only** checkbox if you want to receive only number data in the response from SMS/800. If this box is NOT selected, the query will also return the date, time, and status for each customer record.

Select the **Update 800ForAll Availables** checkbox if you want to force **800ForAll** to update it's database with the correct status for this number. This checkbox is only available when the **Update Avails** checkbox has been set for the User Type of this User.

Select the **Send** button. A message will appear in the response frame indicating the status of the request.

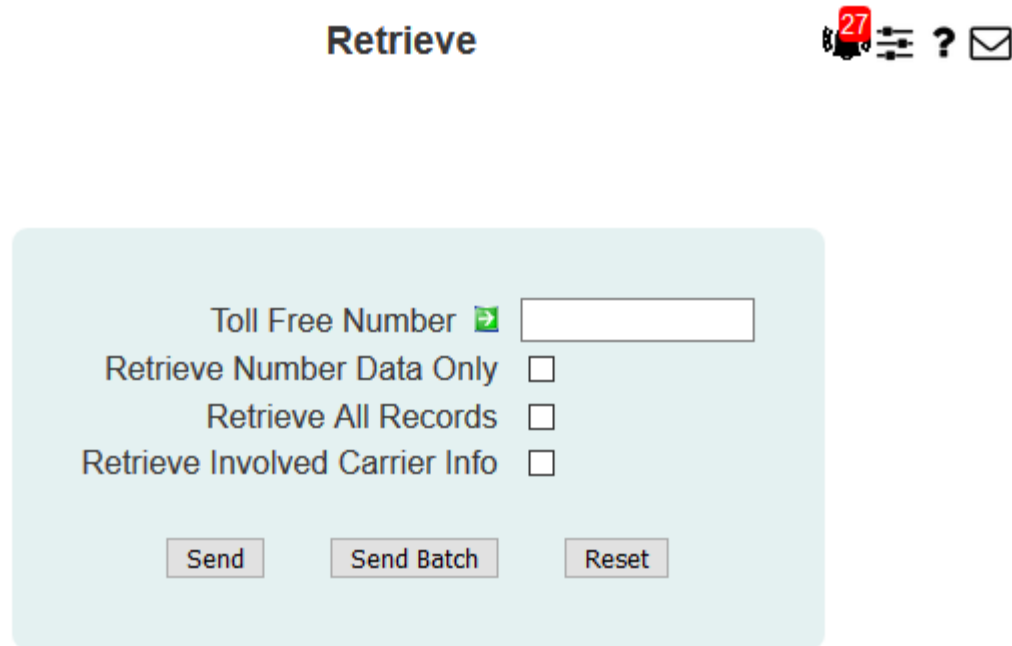
Batch Query

This function allows you to query the status for each toll free number within a list.

Select the **Send Batch** button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This function allows you retrieve SMS/800 data for a toll free number and store it in the 8MS database. You are also able to retrieve SMS/800 data for a list of numbers (see **Batch Retrieve** below). This function is generally not needed, but may be sometimes be used to synchronize the 8MS and SMS/800 databases.

In the menu frame, select the **Retrieve** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



Retrieve    

Toll Free Number 

Retrieve Number Data Only ☐

Retrieve All Records ☐

Retrieve Involved Carrier Info ☐

Specify the number to be retrieved in the **Toll Free Number** field. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

Select the **Retrieve Number Data Only** checkbox if you want to retrieve only number data from SMS/800. If this box is NOT selected, customer record information will also be retrieved.

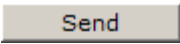
Select the **Retrieve All Records** checkbox if you want to force all customer records to be retrieved. An 8MS system parameter may be set to not retrieve OLD records, for example. This checkbox overrides the parameter. Note that **Retrieve All Records** turns off **Retrieve Number Data Only**, and vice versa.

Select the **Retrieve Involved Carrier Info** checkbox if you want to view records for a number which you do not own but for which you are a carrier. You may only retrieve that part of the routing that involves yourself as a carrier; no other routing data may be retrieved.



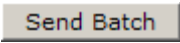
Access to the **Retrieve Involved Carrier Info** checkbox is not available to all 8MS companies and is granted based on need. If you do not have access to this feature, the checkbox will not appear. The most likely reason for needing this feature is if you are a carrier and you need to view the routing for numbers

not under your company's control.

Select the  button. A message will appear in the response frame indicating the status of the request.

Batch Retrieve

This function allows you retrieve data from SMS/800 for a list of toll free numbers. The values of the **Retrieve Number Data Only** and **Retrieve All Records** checkboxes will be honored by the batch job.

Select the  button. The Batch Popup will appear. See [Batches](#) in the [Common Features](#) section for details on the Batch Popup.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Retrieve Preferences](#) for details on customizing this screen.

This function allows you to search SMS/800 for available toll free numbers matching specified selection criteria and to reserve any or all of the numbers found.

In the menu frame, select the **Search/Reserve** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame.

The screenshot shows the 'Search / Reserve' interface with two main sections: 'Search Criteria' and 'Reservation Data'.

Search Criteria:

- Toll Free # Count
- or Contiguous ☐
- NPA NXX Line Contiguous Minimum
- or
- NPA: ☐ Any ☐ 800 ☐ 888 ☐ 877 ☐ 866 ☐ 855 ☐ 844
- Number or Word ☐ Contains ☐ Starts With ☐ Ends With Trailing Digits:

Reservation Data:

- RespOrg
- Contact
- Notes
- Create Number List ☒
- Activate ☐ Use Defaults ☐

Buttons at the bottom: Search, Batch Search, Reserve, Batch Reserve, Reset.

Two portions of this screen are controlled by **Company Preferences**. The first preference, *ReserveCustNameRequired*, determines whether or not the **Customer Name**, **Billing Tel #**, and **Order #/Svc Req** fields appear. The second preference, *Search8fa*, determines whether or not the **800ForAll** fields appear. (See below for more information on the purpose of these 2 sections.) With both of these preferences turned off, the screen appears as shown below.

This screenshot shows the 'Search / Reserve' interface with some differences from the first one, reflecting the 'Company Preferences' being turned off.

Search Criteria:

- Toll Free # Count
- or Contiguous ☐
- NPA NXX Line Contiguous Minimum

Reservation Data:

- RespOrg
- Contact
- Notes
- Create Number List ☒
- Activate ☐ Use Defaults ☐

Buttons at the bottom: Search, Batch Search, Reserve, Batch Reserve, Reset.

The **Search/Reserve** screen consists of two sections. The **Search Criteria** fields are used to indicate the type of number you are interested in, and the quantity you want. **Reservation Data** is the information to be associated with any numbers reserved.

Searches and reserves may be performed through to one of two different services:

- **SMS/800** allows searching for a specific toll-free number, a pattern which uses wildcards, or a range of NPA, NXX and Line values. When specifying a toll-free number with wildcards, the search pattern must be exactly 10 digits or letters.
- **800ForAll** provides more power and flexibility. An additional wildcard is available for pattern matching. The search number or word may be 1-7 digits and letters (or exactly 10 if specifying a toll-free NPA). Additional radio buttons provide flexibility as to where the search pattern must fit within the toll-free number, at the start, at the end, or anywhere.

The fields for searching, and what search engine uses each field, are described below.

Field	Description
Toll Free #	This field allows you to specify a particular toll free number, or to use wildcard characters to specify a pattern to be matched. Valid wildcards are numbers, letters, asterisks (to specify that <i>any</i> digit is acceptable) and ampersands (to specify that a digit must be the same as the other ampersands). Note that ampersands must be used in groups of two or more. <i>This field is only used by SMS/800.</i> The following is an example of a valid wildcard combination: 877&&&TREE. This combination would return numbers such as 877-555-8733, 877-333-8733, etc. If the specified count exceeds the possible amount of combinations that may occur, 8ms will automatically reduce the count to speed up response to the request. For example, a search of 800123456* has a maximum possible count of 10 (digits 0-9). If you enter this search pattern and provide a count of 100, 8ms will automatically change this count to 10.
NPA/NXX/Line	These fields are an alternative to the Toll Free Number field and provide a different form of searching. Only digits may be entered into the NPA, NXX and Line fields; wild cards are not allowed. Specifying an NPA means only look for numbers in this NPA. Specifying an NXX or Line means begin the search by looking for digits that exactly match each field. If the digits specified in these two fields are not found, SMS/800 looks for numbers greater than the digits specified for each field. <i>These fields are only used by SMS/800.</i> For example, specifying an NXX of 333 ensures that the NXX will be between 333 and 999; nothing lower than 333 will be returned. Specifying a Line of 4444 ensures that the Line will be between 4444 and 9999; nothing lower than 4444 will be returned. These fields may be combined to force a minimum value for each of the fields. For example, specifying an NXX of 583 and Line of 4567 ensures that all parts of the toll-free number will be equal to or greater than the specified value. Thus, this search might return 866-590-5300 but would not return 866-582-5300, since the NXX part is less than the specified NXX search value. You may use the Toll Free Number field <u>OR</u> the NPA/NXX/Line fields but may not use both.
Count	This field is used to specify the maximum number of toll free numbers to search for in SMS. <i>This field is used by both SMS/800 and 800ForAll.</i>

Contiguous When this checkbox is selected, SMS will return only toll free numbers which are contiguous. The length of the contiguous block is the value specified in the **Count** field.

*This field is used by both **SMS/800** and **800ForAll**.*

If a pattern is given for a set of contiguous numbers, this is merely the starting point of the contiguous set and does not guarantee that all numbers will match this pattern.



For example if you search for 10 contiguous numbers matching 800*****2* and the first number returned is 800-555-0021, the last number will be 800-555-0030. This clearly does not match the pattern, but gives a contiguous set of 10 beginning with the matching pattern.

Contiguous Minimum This field is valid only when the **Contiguous** checkbox is selected. If this field is blank, then the length of an available contiguous block must match the value in the **Count** or the request fails. If a value appears in **Contiguous Minimum**, then the request will succeed as long as the length is between the minimum and count. If a block of at least the minimum cannot be found, the request will fail.

*This field is used by both **SMS/800** and **800ForAll**.*

Area Code Checking one or more toll-free area codes checkboxes limits the search to the selected area codes. Not checking any checkboxes is equivalent to checking the **All** checkbox.

*This field is only used by **800ForAll**.*

Number or Word This field allows you to specify a specific toll-free number, a partial toll-free number, or a word. Any number of digits or letters from 1 to 7, or 10 if entering a toll-free NPA, may be entered. If exactly 10 digits are entered, the first 3 are deleted and the appropriate **Area Code** checkbox is then selected. Wildcards may be used to specify a pattern to be matched. Valid wildcards include the ones described in the **Toll Free #** field, above, plus an additional percent character, which behaves in a manner identical to the ampersand character. Thus, this field accepts numbers, letters, asterisks (to specify that *any* digit is acceptable), ampersands (to specify that a digit must be the same as the other ampersands), and percents (to specify that a digit must be the same as the other percents). Note that ampersands and percents must be used in groups of two or more.

*This field is only used by **800ForAll**.*

Some examples of an **800ForAll** search include

- ***&%&% - matches numbers beginning with 3 digits, then digits 7 and 9 would be identical to one another while digits 8 and 10 would also be

identical to one another, producing matches such as 800-123-4545, 855-483-6969, and 888-391-7272.

- *grizzly* - matches any toll-free number that matches this string. See **Positional Search** and **Trailing Digits**, below, for additional information.
- *800grizzly* - matches any toll-free number that begins with 800 and matches the reset of the string. See **Positional Search** and **Trailing Digits**, below, for additional information.

Positional Search You may specify where a word should fit into a pattern by selecting one of the radio buttons labeled **Starts With**, **Anywhere**, and **Ends With**. Positional search does not include searching the 8** NPA, so the pattern is compared against digits 4-10. By default, **Anywhere** is checked. This indicates that any number containing the entered pattern will be shown. Selecting **Starts With** indicates that the number must begin with this string. Selecting **Ends With** indicates that the number must end with this string.

*This field is only used by **800ForAll**.*

Trailing Digits The **Number or Word** field can be allowed to match beyond the end of a toll-free number by specifying how many trailing digits are allowed to be part of the pattern. For example, searching for the pattern *veteran* may not produce any matching numbers. By adding 1 or 2 trailing digits, the search may produce numbers such as *80012veteran*.

*This field is only used by **800ForAll**.*



If **Trailing Digits** is 0, 1 or 2 the search will return results that match up to the specified value.

If **Trailing Digits** is blank, the search is first executed with a value of **0**. If no results are returned then a second search is executed with a value of **2**.

Create Number List When this checkbox is selected, a number list will automatically be created which contains all the numbers located with a search. A separate list will be created that contains all the numbers successfully reserved. A name will automatically be assigned to the lists with the user ID and the date/time when the search or reserve succeeded. The list name is either of the form **Search successes - SSSSS**, or **Reserve successes - SSSSS**, where SSSSS is a unique identifier.

*This field is used by both **SMS/800** and **800ForAll**.*

Number List Name As explained immediately above, a default name is created when creating a Number List. The **Number List Name** field allows you to override the default with your own list name.

*This field is used by both **SMS/800** and **800ForAll**.*

InterLATA Carrier InterLATA carrier, sent in the SMS/800 iec field.

Once the selection criteria is specified, **Reservation Data** must be provided in the right hand column. The **RespOrg**, **Contact Name**, and **Contact Phone** indicate the owning RespOrg and a contact for the number. If the Company/User Preferences **ReserveResporg**, **ContactName** and **ContactPhone** have been set, these 3 fields will be populated with the preferences. See [Search/Reserve Preferences](#) for details on setting Company/User Preferences.

Several additional fields are available when reserving numbers, and are described below.

Field	Description
Notes	This is an optional field intended to provide an area for any notes to be stored with this number. This field is stored on SMS/800 and is associated with the number.
Customer Name	This is used for individual company auditing and tracking purposes, allowing a company to track what customer a number has been reserved for. This field will only appear if the ReserveCustNameRequired Company Preference is set. When it appears, it is a required field. This field is stored on 8MS only; it is not sent to SMS/800.
Billing Tel #	This is used in conjunction with the Customer Name field. It is used for individual company auditing and tracking purposes. This field will only appear if the ReserveCustNameRequired Company Preference is set. This field is stored on 8MS only; it is not sent to SMS/800.
Order #/Svc Req	This is also used in conjunction with the Customer Name field. It is used for individual company auditing and tracking purposes. This field will only appear if the ReserveCustNameRequired Company Preference is set. This field is stored on 8MS only; it is not sent to SMS/800.

Additionally, if you have permission, you may automatically activate any toll free numbers that are successfully reserved if the **Activate** checkbox is selected. This is discussed below.

Search

Select the button to begin the search. The response frame will display search results as soon as they are received, even if more results are still expected. A typical response to a search might look like this:

10 numbers found.

866 (10)

866-273-1077 ☐	866-273-3144 ☐	866-273-4155 ☐	866-273-5155 ☐	All 866	No 866
866-273-2133 ☐	866-273-3944 ☐	866-273-4244 ☐			
866-273-3022 ☐	866-273-4099 ☐	866-273-4355 ☐			

Note the new appearance of the , and buttons. These features are disabled while a search is in progress.

You can use the button to discontinue the search and re-enable these features.

If your query is unable to find all the numbers that match your filter criteria, and you have contracted with 8MS for the 800ForAll add-on feature, you may see additional numbers listed. Such a response will appear as shown.

40 numbers found. Reserve Selected #s Select All Select None

Spare Numbers from SMS/800.

800 (29)

800-889-6514 ☐	800-280-7943 ☐	800-210-5994 ☐	800-476-0188 ☐	All 800 No 800
800-889-6376 ☐	800-280-7961 ☐	800-210-5793 ☐	800-290-7585 ☐	
800-889-6284 ☐	800-843-2149 ☐	800-290-7857 ☐	800-466-5527 ☐	
800-889-6533 ☐	800-476-1313 ☐	800-290-7789 ☐	800-466-5454 ☐	
800-224-4662 ☐	800-290-7922 ☐	800-690-5630 ☐	800-819-3674 ☐	
800-224-5264 ☐	800-466-5134 ☐	800-690-5435 ☐		
800-224-4794 ☐	800-210-5301 ☐	800-280-8222 ☐		
800-224-4723 ☐	800-881-0681 ☐	800-690-5772 ☐		

Available Numbers as defined in your 8MS contract.

800 (11)

800-585-6891 ☐	800-519-4036 ☐	800-520-6687 ☐	800-584-5116 ☐	All 800 No 800
800-581-2338 ☐	800-520-3615 ☐	800-584-4318 ☐	800-585-7167 ☐	
800-581-2782 ☐	800-521-0316 ☐	800-581-0753 ☐		

Contact 8MS Sales if you have more questions on the 800ForAll add-on feature.

Each number that is returned is displayed as a checkbox. The numbers are sorted and grouped by NPA. Numbers are selected for reservation by having their checkboxes checked. The buttons Select All and Select None are provided to respectively select and deselect all numbers in the result set. Each NPA group has buttons to select and deselect all numbers in the NPA.

The Retrieve More Results button is displayed whenever more results are expected. Clicking it updates the response frame with the latest results. This button is not displayed if all results have been retrieved. Note that, if the **Contiguous** checkbox is checked, no results will be displayed until all results have been received.

Select the Reserve Selected #s button to reserve the selected numbers. You may do this any time after you have selected one or more numbers even if all the results have not been received. A message will appear in the response frame indicating the status of the request:

10 numbers reserved until 10/15/07 : 866-273-3944, 866-273-4099, 866-273-4155, 866-273-1077, 866-273-4244, 866-273-2133, 866-273-4355, 866-273-3022, 866-273-5155, 866-273-3144

Batch Search

This function allows you to search for a list of toll free numbers.

Select the Batch Search button. The following pop-up window will appear:

The list of numbers to be checked can be specified in one of two ways:

- In the **Number List** field, use the drop-down box to select a previously-defined list of toll free numbers (see the [Number List](#) screen).
- Use the **Numbers** field to enter one or more toll free numbers, separated by a space or a new line.

Use the **Max Msgs per Hour** field to limit the number of messages per hour being sent to SMS/800. This is intended to help you avoid exceeding the per Resp Org CPU percent allocation defined by SMS/800.

Use the **Comments** field to enter optional notes that will appear in the **Batch Log**.

The **Run Date/Time** field may be used to specify the date and time when the batch change will be sent. If left blank, the batch job will run ASAP.

Select the **Send** button. The batch operation will be initiated and the Batch Popup is closed. Results of batch operations will appear on the [Activity Log](#) and [Batch Log](#) screens.

Reserve

This function allows you to reserve toll free numbers without searching first. This option can be used if you require some amount of random toll-free numbers. The process of selected numbers by checkbox as described above is bypassed when reserving directly.

Fill in the **Search Criteria** and the **Reservation Data** as previously described. Click the **Reserve** button. A message will appear in the response frame indicating the status of the request.

Reserve and Activate

This function allows you to automatically activate any successfully reserved numbers.

If you have permission to automatically activate reserved numbers, two additional checkboxes will appear on the **Search/Reserve** screen: **Activate** and **Use Defaults**. Select the **Activate** checkbox. Now execute a **Search** or **Reserve** as you normally would. After selecting the **Reserve** button or the **Reserve Selected #s** (if doing a search and then reserve), this popup will appear.

Reserve and Activate - Windows Internet Exp...

Reserve and Batch Activate

Up to 5 numbers will be reserved and batch activated.

Source Record

Routing Template ☒

or

Toll Free Number Date/Time

Max Msgs per Hour

Batch Comment

Destination

Date/Time ☐ High Priority

Done 100%

Select your **Source Record** 8MS Routing Set or toll-free number.

Provide a **Destination Date/Time** when the records should activate on SMS/800.

Use the **Max Msgs per Hour** field to limit the number of messages per hour being sent to SMS/800. This is intended to help you avoid exceeding the per Resp Org CPU percent allocation defined by SMS/800.

Use the **Batch Comments** field to enter optional notes that will appear in the **Batch Log**.

Select the button. When the numbers have been successfully reserved, a batch **CopyRecord** will be run. This may then be tracked as any other batch would, via the **Batch Log** or **Activity Log**.

If you expect to use this source 8MS Routing Set or toll-free number multiple times you may save this source as a default. To do so, after selecting your source, select the button. Now, whenever you select the **Use Defaults** checkbox on the **Search/Reserve** screen, your default source will automatically be populated. If you do not want to use this default, leave the **Use Defaults** checkbox unselected and the **Reserve and Batch Activate** popup will not populate with the default source.

If you want to clear out your default source, select the button.

Note that the default source is saved per user. If you would like this default to be a company-wide default, please contact 8MS support.

Batch Reserve

This function allows you to attempt to reserve a list of particular toll free numbers.

Enter the **Reservation Data** as described above. Select the button. The following pop-up window will appear:

Batch Reserve

Number List

Numbers

Max Msgs per Hour

Comment

Run Date/Time

Internet | Protected Mode: On 100%

The list of numbers to be reserved can be specified in one of two ways:

- In the **Number List** field, use the drop-down box to select a previously-defined list of toll free numbers (see the [Number List](#) screen).
- Use the **Numbers** field to enter one or more toll free numbers, separated by a space or a new line.

Use the **Max Msgs per Hour** field to limit the number of messages per hour being sent to SMS/800. This is intended to help you avoid exceeding the per Resp Org CPU percent allocation defined by SMS/800.

Use the **Comments** field to enter optional notes that will appear in the **Batch Log**.

The **Run Date/Time** field may be used to specify the date and time when the batch change will be sent. If left blank, the batch job will run ASAP.

Select the button. The batch operation will be initiated and the Batch Popup is closed. Results of batch operations will appear on the [Activity Log](#) and [Batch Log](#) screens.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Search/Reserve Preferences](#) for details on customizing this screen.

This popup allows you to view, refresh and resend SCP data. Whenever a toll-free number or SMS Template record is activated in SMS/800, 8MS receives an unsolicited message informing 8MS that this record has entered the *Sending* or *Active* state. Included in that unsolicited message is information about the status of each SCP to which SMS/800 has sent this record. If the record is processed smoothly and quickly by all SCPs, the unsolicited message will indicate that the record has been loaded on each SCP. If an SCP is queuing messages or is currently unavailable, the unsolicited message will also contain this information for that SCP. 8MS stores the status of each SCP for this particular record, associated by the date/time of the record.



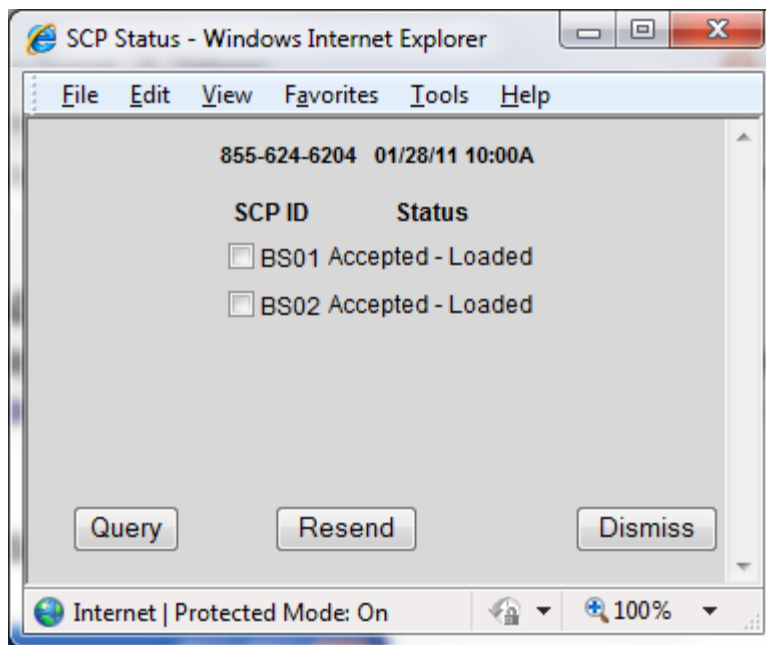
SCP status data shown in this popup is a snapshot of the status of the record at the time 8MS received the data from SMS/800. If the status of the record changes for one or more SCPs and SMS/800 fails to notify 8MS, the status in this popup will not reflect the current state of the record.

SCP status information is currently available from the following screens.

- **Record Management: SMS/800 CAD**
- **Record Management: SMS/800 PAD**
- **Search Local Numbers**
- **Search Local Records**
- **SMS Template Management**
- **Search Local SMS Templates**

A clickable image  will appear to the left of the toll-free number, SMS Template or date/time of a record. View the above links for an explanation of where this image appears on each screen.

Select the  image to view the SCP status data. This data will appear in the **SCP Status** Popup.



If an unsolicited activation message was received from SMS/800 then the set of data sent with that unsolicited message will be shown. In the example shown above, SMS/800 only provided information on two SCPs: *BS01* and *BS02*.

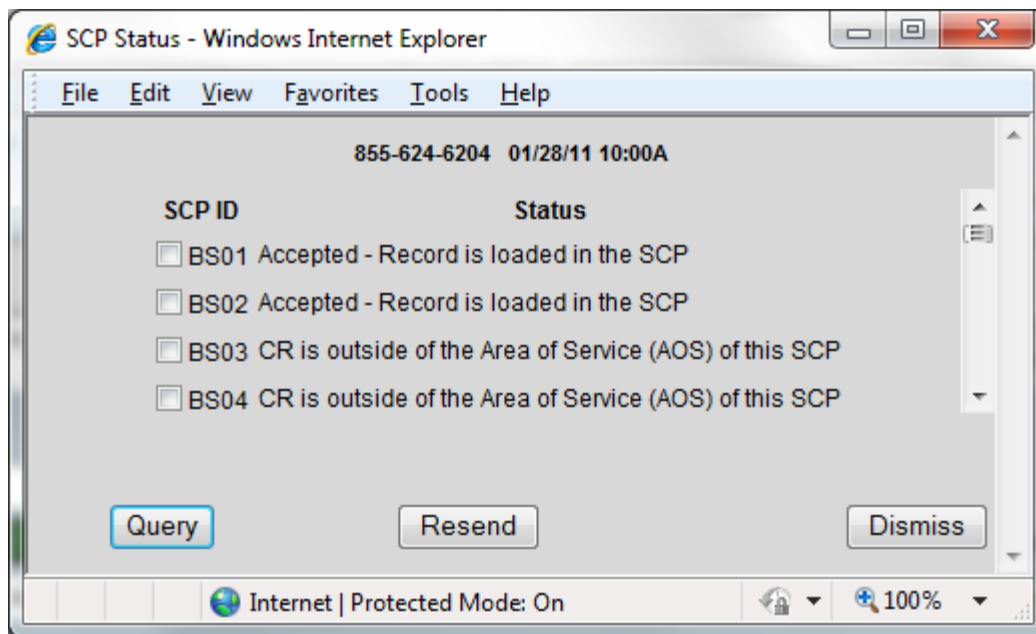
SCP Query

You may update the SCP status data clicking on the **Query** button.

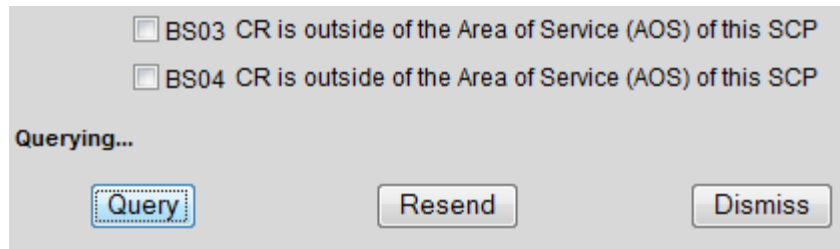


Somos no longer supports the ability to query a single SCP. If no SCP checkboxes have been selected, clicking the **Query** button will automatically select **all** SCP checkboxes, causing the query to ask about all SCPs.

Data returned may include SCPs that are not involved in this record. In the example below, only the SCPs *BS01* and *BS02* are involved with this record, so the other SCPs are marked as being outside the Area of Service. Note that in this example there is a scrollbar to the right of the list of SCPs indicating that there are more records than can fit in the popup; move the scrollbar to view the additional records.



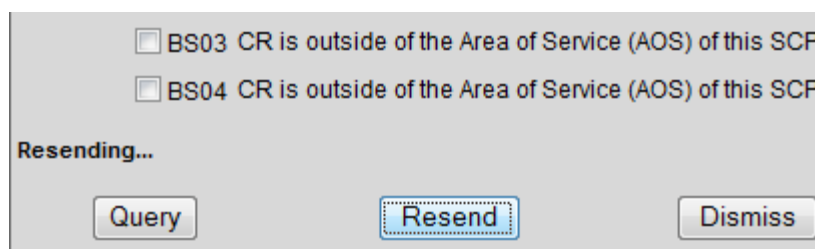
While a query is in progress the text *Querying...* will display just above the **Query** button, as shown in the example below. When the query completes, the text will disappear.



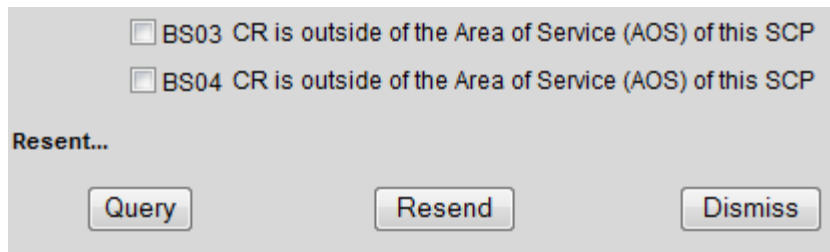
SCP Resend

You may resend the record to one or more SCPs by clicking on the **Resend** button. Selecting one or more checkboxes and then clicking on the **Resend** button will resend the record to the specified SCPs. If no checkboxes are selected prior to clicking the **Resend** button then the record will be resent to all SCPs.

While a resend is in progress the text *Resending...* will display just above the **Query** button, as shown in the example below.



When the query completes, the text *Resending...* will be replaced by the text *Resent...*, as shown in the example below. The set of SCP data at the top of the popup will not change. The text *Resent...* indicates that the resend succeeded.



SCP Failures

It is possible for query and resend actions to fail. If that occurs, the message *Query failed* or *Resend failed* will appear.

It is also possible for communications between 8MS, Somos and the SCPs to time out. In that case, the message *SMS is taking too long* will appear.

Dismiss

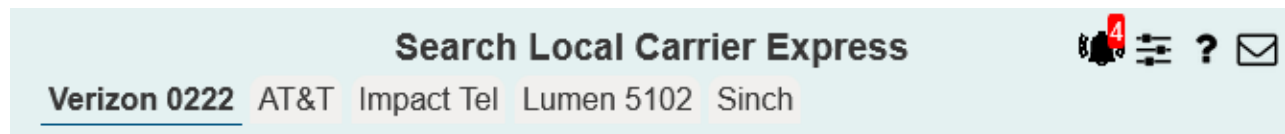
Selecting the **Dismiss** button will dismiss the **SCP Status** popup.

This screen allows you to search the Carrier Express customer activation records based on a variety of criteria. The result of the search can be counts of numbers, a list of matching records, or input to a number list. Searches are restricted to a particular carrier; you may not view records from multiple carriers.

In the menu frame, select the **Search Local CarExp** link located in the **Number Admin** section of the menu.

Filtering Records: Common Fields

Each carrier has its own unique set of data. As a result of this, you may only view the data of one carrier at any one time. You choose a carrier by selecting the tab with that carrier's name on it, as shown below.



Each carrier has a common set of search criteria. In addition, some carriers may have additional search criteria. **Verizon 0222** only uses the common search criteria. Below is a screenshot of the search area used by both of these carriers.

The following is a description of the common search criteria:

Field	Description
Toll Free Number InterLATA Carrier	search for records for a particular number. The value can contain the asterisk (*) wildcard to do a pattern search. For example, 800*****00 will select all the 800 numbers ending in double 0.
RespOrg	search for records belonging to a given RespOrg. If less than five characters are entered then this field is treated as a wildcard and the search looks for any data in which the left part of the RespOrg matches. The is not checkbox selects numbers that do not belong to the given RespOrg.
Response Start Date - Response End Date	search for records whose response date (the date this record came back from Carrier Express) falls within the given date range. Either value may be omitted to select numbers with end dates after or before a given value.

Latest Date normally, if a toll free number has multiple records, they are all displayed. If the **Latest Date** checkbox is selected, only the one record with the latest date will be displayed for any given number.

Number List restrict the search to only those numbers in the given list. If any numbers in the list do not exist in the 8MS database, they are ignored.



restrict the search to only those numbers specified in the **Dynamic List of Numbers** popup associated with this button. See the **Dynamic List of Numbers** section of **Choice Lists** for details on this button and how to use it.

Be aware that only one of **Number List** or **Dynamic List of Numbers** may be used for a search.



Selecting a **Number List** will clear out the **Dynamic List of Numbers**; setting numbers in the **Dynamic List of Numbers** popup will clear out the selected **Number List**.

These criteria can be combined to form more complex queries.

Filtering Records: AT&T

Along with the common search criteria, the **AT&T** tab provides additional search criteria specific to AT&T. The AT&T search area is shown below.

Profile v	APN	Order ID
MCN v	LSO	Client Order #

The following is a description of the AT&T-specific search criteria:

Field	Description
Profile	search for records matching the specified Profile name.
APN	search for records matching the specified Action Point Number.
Order ID	search for records matching the specified Order ID.
MCN	search for records matching the specified MCN.
LSO	search for records matching the specified Local Serving Office.
Client Order #	search for records matching the specified Client Order Number.

Filtering Records: Lumen-5102

Along with the common search criteria, the **Lumen-5102** tab provides additional search criteria specific to Lumen-5102. The Lumen-5102 search area is shown below.

Customer Number		Service Status is not	☐		Unknown Entries Only	☐
Order ID		Order Status is not	☐		Order Type	

The following is a description of the Lumen-5102-specific search criteria:

Field	Description
Customer Number	search for records matching the specified Lumen-5102 customer number.
Service Status	search for records matching the specified Service Status.
Order ID	search for records matching the specified Order ID.
Order Status	search for records matching the specified order status.
Unknown Entries Only	search for records where the toll-free number is unknown (i.e. not stored on this 8MS platform).
Order Type	search for records matching the specified order type.

Viewing Records

Below the search criteria are a series of buttons, as shown below.

Retrieve	Retrieve All	Show Counts	Create Delimited List	Create Number List	Reset

Once the search criteria have been specified, a search is initiated with one of the following buttons:

Retrieve retrieves all records matching the search criteria. The records are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All

retrieves and displays all records matching the search criteria. The resulting records are not grouped into pages. If many records are selected by the given criteria, this may take some time.

The **Retrieve** and the **Retrieve All** results appear in the lower frame. An example of results from a **Verizon 0222** search is shown below.

40 records found

☐ Numbers Only

Toll Free #	Request Date/Time	Response Date/Time	Resporg	Corp ID	Plan ID
855-201-4325	01/31/11 10:54A	01/31/11 10:54A	ART19	F1234567	1
855-624-6204	01/26/11 08:54A	01/26/11 08:54A	ART19	F1234567	1
855-624-6206	01/26/11 08:54A	01/26/11 08:54A	ART19	F1234567	1
877-448-6103	11/11/10 03:17P	11/11/10 03:17P	ART21	F1234567	1
877-665-5361	12/09/10 04:08P	12/09/10 04:08P	ART19	F1234567	1
877-665-5370	12/09/10 04:08P	12/09/10 04:08P	ART19	F1234567	1
877-665-5372	12/09/10 04:08P	12/09/10 04:08P	ART19	F1234567	1
877-665-5375	12/09/10 04:08P	12/09/10 04:08P	ART19	F1234567	1
877-665-5377	12/09/10 04:08P	12/09/10 04:08P	ART19	F1234567	1
877-665-5378	12/09/10 04:08P	12/09/10 04:08P	ART19	F1234567	1

When records are displayed using either **Retrieve** or **Retrieve All**, the **Sort By** drop-down is used to control the order of the results. By default, results are ordered by toll free number.

Show Counts finds the numbers matching the search criteria and displays the total number of records found. This will not display any toll free numbers; the lower frame will be cleared. The results are displayed as shown in the following:

TOTAL RECORDS 37

Data List Links

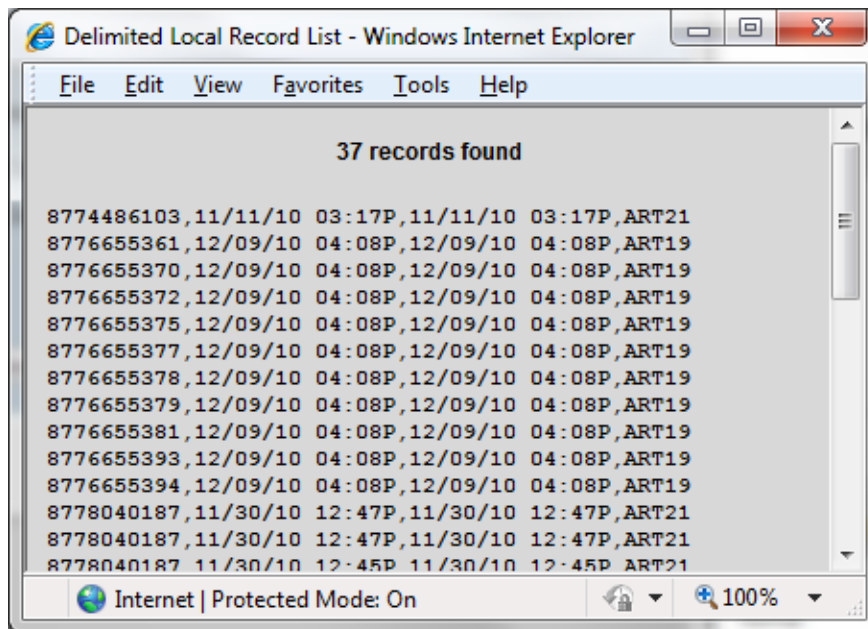
The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the **Data Lists** section of the user guide.

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See **Shortcuts** for details.

Alternate Result Format

Create Delimited List retrieves all records matching the search criteria. Instead of displaying results in the bottom frame, a popup is produced containing the retrieved data in a comma-separated format. The popup is depicted below:



This format, useful for import into a spreadsheet for example, is also supported by [Search Local Numbers](#), [Search Local Records](#) and [Activity Log](#).

Number Lists

[Create Number List](#) allows the results of the search to be placed into a number list instead of being displayed. Information about the list to be created, such as the list name, is specified on a popup window. See [Number List Popup](#) for more information.



When creating a number list in **Search Local Carrier Express**, there is no need to select either **Retrieve** or **Retrieve All** first.

Dynamic List of Numbers

It is also possible to quickly create a dynamic list of numbers (rather than a named Number List) that can be pasted into an 8MS **Numbers** text area for a batch or into any other application on your computer. As noted above, selecting either **Retrieve** or **Retrieve All** will show a list of numbers and associated detail in the lower frame. In the upper left of the lower frame is a checkbox labeled **Numbers Only**. Selecting this checkbox will change the lower frame from a list of detail with a **Number History** link on each number to a simple, text-only list of numbers. This allows the set of numbers found to be easily selected, copied and then pasted wherever you wish.

Customization

There are preferences that may be set to change the behavior of this screen. These preferences are shared with **Search Local Records** and **Search Local SMS Templates**. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Search Local Records/Search Local Carrier Express Preferences](#) for details on customizing this screen.

This function allows you to search the local toll free number data based on a variety of criteria. The result of the search can be counts of numbers by status, a list of matching toll free numbers, or input to a number list.

In the menu frame, select the **Search Local #** link located in the **Number Admin** section of the menu. The screen is divided into two main areas. The top portion allows you to specify the search criteria. This section appears as follows:

Search Local Numbers

Toll Free Number RespOrg is not ☐ Unknown Entries Only ☐

Status is not ☐

Assigned ☐ Disconnected ☐ Reserved ☐ Spare ☐

Suspended ☐ Transitional ☐ Unavailable ☐ Working ☐

SMS Template is not ☐

8MS Routing Set is not ☐

Number List or

Status Date -

Last Active -

End Date -

Sort by Toll Free #

Numbers

The following is a description of the search criteria:

Field	Description
Toll Free Number	search for a particular number. The value can contain the asterisk (*) wildcard to do a pattern search. For example, 800*****00 will select all the 800 numbers ending in double 0.
RespOrg	search for numbers belonging to a given RespOrg. If less than five characters are entered then this field is treated as a wildcard and the search looks for any data in which the left part of the RespOrg matches. The is not checkbox selects numbers that do not belong to the given RespOrg.
Unknown Entries Only	a checkbox that can be used to retrieve only the unknown numbers. This can be used, for example, to find the subset of unowned numbers from a larger set.

The **Unknown Entries Only** checkbox can also be used to find numbers that belong to an SMS Template but are not in 8MS.



To use this feature, you must



have an *SMS/800 WRS* login associated with your 8MS company. Contact the 8MS Support Team for assistance in configuring this.

- Status** search for numbers whose status matches any of the selected values. The **Select All** and **Select None** buttons are provided for quick selection. The **is not** checkbox selects numbers whose status is not any of those selected.
- Status Date** search for numbers whose status date falls within the given date range. Either value may be omitted to select numbers with status dates after or before a given value.
- Last Active** search for numbers whose last active date falls within the given date range. Either value may be omitted to select numbers with end dates after or before a given value.
- End Date** search for numbers whose end date falls within the given date range. End dates are set for RESERVED and TRANSITIONAL numbers, and indicate the day on which the number will return to SPARE. Either value may be omitted to select numbers with end dates after or before a given value.
- SMS Template** search for numbers in the given SMS Template. The **is not** checkbox selects numbers not in the given SMS Template.
- 8MS Routing Set** search for numbers in the given 8MS Routing Set. The **is not** checkbox selects numbers not in the given 8MS Routing Set.
- Number List** restrict the search to only those numbers in the given list. If any numbers in the list do not exist in the 8MS database, they are shown as unknown.
-  restrict the search to only those numbers specified in the **Dynamic List of Numbers** popup associated with this button. See the **Dynamic List of Numbers** section of **Choice Lists** for details on this button and how to use it.

Be aware that only one of **Number List** or **Dynamic List of Numbers** may be used for a search.



Selecting a **Number List** will clear out the **Dynamic List of Numbers**; setting numbers in the **Dynamic List of Numbers** popup will clear out the selected **Number List**.

Numbers: this drop-down list lets you filter by one of several values.

- *w/o 8MS Routing Set:* search for numbers that do not have an 8MS Routing Set assigned.
- *with SMS Template:* search for numbers that point to an SMS Template.
- *w/o SMS Template:* search for numbers that do not point to an SMS Template.

These criteria can be combined to form more complex queries. Some examples might be:

- all of the RESERVED numbers that will go back to spare in the next week
- all of the WORKING numbers for a specific RespOrg

Once the search criteria are specified, the search is initiated with one of the following buttons:

Retrieve retrieves all numbers matching the search criteria. The numbers are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves and displays all numbers matching the search criteria. The resulting numbers are not grouped into pages. If many numbers are selected by the given criteria, this may take some time.

The **Retrieve** and the **Retrieve All** results appear in the lower frame as shown in the following:

Show Numbers Only		Records per Page 15		Set	Revert	Hide Filters
Record(s): 1 to 15 of 202			Page 1 2 3 4 5 6 7 8 of 14			Next 15 Last
Toll Free #	Status	Status Date	Resporg	Last Active Date	End Date	8MS Routing Set/ SMS Template
800-655-0186	Transitional	04/12/21	ART19			
 800-655-0557	Working	06/01/21	ART19	05/13/99		000001786
800-655-0645	Assigned	04/21/21	ART34			#-1
 833-303-1863	Working	03/22/22	ART19			*AR-GAF-467
833-307-0854	Transitional	04/01/21	ART03			
 833-319-1795	Working	06/28/21	ART03			#-1
 833-328-0670	Working	01/26/21	ART19			Beta 2
833-328-0713	Assigned	04/19/21	ART19			

When records are displayed using either **Retrieve** or **Retrieve All**, the **Sort By** drop-down is used to control the order of the results. By default, results are ordered by toll free number.

Show Counts finds the numbers matching the search criteria and displays the totals for each number status. This will not display any toll free numbers; the lower frame will be cleared. The results are displayed as shown in the following:

Assigned 72	Suspended 0	Unknown 0
Disconnected 6569	Transitional 1260	Working 289278
Reserved 7989	Unavailable 84	TOTAL 305252

When **Show Counts** is used in conjunction with a number list, the count of unknown numbers is always shown. If the **Unknown Entries Only** checkbox is checked, the count will be of the unknown numbers only.

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details

on these links is discussed in the [Data Lists](#) section of the user guide.

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See [Shortcuts](#) for details.

SCP Status

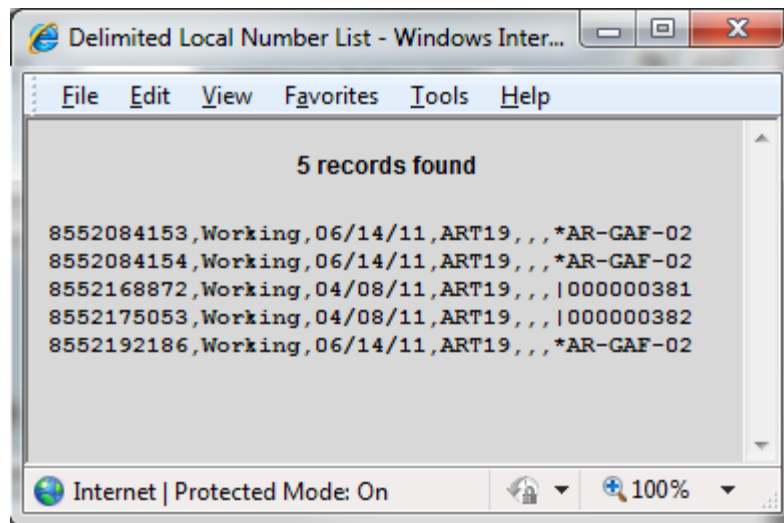
To the left of the **Toll Free #** field in the results you will see the image . Clicking on this image will produce a popup containing the latest SCP status information for this particular toll-free number's record. For more information, see [SCP Status](#).

Toll Free Number/8MS Routing Set Report

The **8MS Routing Set** or **SMS Template** for a particular toll-free number and date/time shown in the results may appear as a hyperlink. Clicking on the link for an SMS Template or 8MS Routing Set will produce a popup allowing you to generate a pdf report of the selected SMS Template or 8MS Routing Set. For a description of the report and its associated popup, see [Toll Free Number/8MS Routing Set Report](#).

Alternate Result Format

[Create Delimited List](#) retrieves all numbers matching the search criteria. Instead of displaying results in the bottom frame, a popup is produced containing the retrieved data in a comma-separated format. The popup is depicted below:



This format, useful for import into a spreadsheet for example, is also supported by [Search Local Records](#), [Search Local Carrier Express](#) and [Activity Log](#).

Number Lists

[Create Number List](#) allows the results of the search to be placed into a number list instead of being displayed. Information about the list to be created, such as the list name, is specified on a popup window. See [Number](#)

[List Popup](#) for more information.



When creating a number list in **Search Local #**, there is no need to select either **Retrieve** or **Retrieve All** first.

When used in conjunction with a number list, **Create Number List** will build a list of the known numbers, unless the **Unknown Entries Only** checkbox is checked. In this case, the list will contain only the unknown numbers.

Dynamic List of Numbers

It is also possible to quickly create a dynamic list of numbers (rather than a named Number List) that can be pasted into an 8MS **Numbers** text area for a batch or into any other application on your computer. As noted above, selecting either **Retrieve** or **Retrieve All** will show a list of numbers and associated detail in the lower frame. In the upper left of the lower frame is a checkbox labeled **Numbers Only**. Selecting this checkbox will change the lower frame from a list of detail with a **Number History** link on each number to a simple, text-only list of numbers. This allows the set of numbers found to be easily selected, copied and then pasted wherever you wish.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Search Local Numbers Preferences](#) for details on customizing this screen.

This function allows you to search customer record data based on a variety of criteria. The result of the search can be counts of records by status, a list of matching records, or input to a number list.

In the menu frame, select the **Search Local Rec** link located in the **Number Admin** section of the menu. The screen is divided into two main areas. The top portion allows you to specify the search criteria. This section appears as follows:

Search Local Records

Toll Free Number ☐ Show CIC Any Start Date

RespOrg is not ☐ AOS Any End Date

Status is not ☐

Active ☐ Hold ☐ Old ☐ Saved ☐ Must Check ☐

Disconnect ☐ Invalid ☐ Pending ☐ Sending ☐ Failed ☐ Rejected ☐

☐ Latest Date

SMS Template is not ☐

SMS Routing Set is not ☐

Number List or

Sort by Toll Free #

Records

The following is a description of the search criteria:

Field	Description
Toll Free Number	search for records for a particular number. The value can contain the asterisk (*) wildcard to do a pattern search. For example, 800*****00 will select the records for all 800 numbers ending in double 0.
RespOrg	search for records belonging to a given RespOrg. If less than five characters are entered then this field is treated as a wildcard and the search looks for any data in which the left part of the RespOrg matches. The is not checkbox selects records that do not belong to the given RespOrg.
Start Date - End Date	search for records whose effective dates fall within the given range. Either value may be omitted to select records with effective dates after or before a given value.
CIC	search for records that use one or more particular CIC codes. Use of a CIC code means the CIC appears either as a primary carrier in the CAD, or somewhere in the CPR (if any). CIC codes must be three or four digit values, separated by commas. The type of CIC query is defined using the drop-down list to the right: • Any: matches records that have any of the given CICs (and possibly others)

- **All:** matches records that have all of the given CICs (and possibly others)
- **Exact:** matches records that have all of, and only, the given CICs
- **Not:** matches records that have none of the given CICs

Show CIC controls whether or not CIC information is shown for a **Retrieve** or **Retrieve All**. This option is provided since retrieving CIC information for many records is time-consuming. User may not want to spend the time if not interested in the CIC data. If a search based on CIC is performed (as described above), then **Show CIC** is implied.

AOS search for records based on the Area of Service in the CAD. The field value is a comma-separated list of network codes, NPAs, LATAs, or state codes. (Since three digits for an AOS value can mean either a LATA or an NPA, use either an **L** or an **N** to disambiguate. For example, **L434** means LATA **434**; **N732** means NPA **732**.)

The type of AOS query is defined using the drop-down list to the right:

- **Any:** matches records that have any of the given AOS values (and possibly others)
- **All:** matches records that have all of the given AOS values (and possibly others)
- **Exact:** matches records that have all of, and only, the given AOS values
- **Not:** matches records that have none of the given AOS values

Status search for records whose status matches any of the selected values. The **Select All** and **Select None** buttons are provided for quick selection. The **is not** checkbox selects records whose status is not any of those selected.

Latest Date normally, if a toll free number has multiple records, they are all displayed. If the **Latest Date** checkbox is selected, only the one record with the latest date will be displayed for any given number.

SMS Template search for records in the given SMS Template. The **is not** checkbox selects records not in the given SMS Template.

8MS Routing Set search for records in the given 8MS Routing Set The **is not** checkbox selects records not in the given 8MS Routing Set

Number List restrict the search to records belonging to those numbers in the given list.



restrict the search to only those numbers specified in the **Dynamic List of Numbers** popup associated with this button. See the

Dynamic List of Numbers section of **Choice Lists** for details on this button and how to use it.



Be aware that only one of **Number List** or **Dynamic List of Numbers** may be used for a search.

Selecting a **Number List** will clear out the **Dynamic List of Numbers**; setting numbers in the **Dynamic List of Numbers** popup will clear out the selected **Number List**.

Records this drop-down list lets you filter by one of several values.

- *w/o 8MS Routing Set*: search for records that do not have an 8MS Routing Set assigned.
- *with SMS Template*: search for records that point to an SMS Template.
- *w/o SMS Template*: search for records that do not point to an SMS Template.

These criteria can be combined to form more complex queries. For example, you may want to know all of the customer records for a specific RespOrg that have an ACTIVE status.

Once the search criteria are specified, the search is initiated with one of the following four buttons:

Retrieve retrieves all records matching the search criteria. The numbers are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves and displays all records matching the search criteria. The resulting records are not grouped into pages. If many records are selected by the given criteria, this may take some time.

The **Retrieve** and the **Retrieve All** results appear in the lower frame as shown in the following:

Show Numbers Only						
Records per Page 15				Set	Revert	Hide Filters
Record(s): 1 to 15 of 319				Page 1 2 3 4 5 6 7 8 of 22	Next 15	Last
Toll Free #	Date/Time	Status	Resporg	CPR?	8MS Routing Set/ SMS Template	AOS
800-655-0186	03/22/22 07:28A	Rejected	ART19	--	*AR-GAF-467	US
800-655-0186	05/01/22 08:00A	Rejected	ART19	--	*AR-GAF-467	US
SCP 800-655-0557	06/01/21 12:15P	Old	ART19	Yes	000001646	US
SCP 800-655-0557	06/11/22 02:15P	Old	ART19	Yes	000001786	US
SCP 800-655-0557	03/01/23 08:00A	Active	ART19	Yes	000001786	US
800-655-0645	06/01/21 08:00A	Pending	ART34	No		US
SCP 833-303-1863	03/22/22 06:15A	Active	ART19	--	*AR-GAF-467	US
SCP 833-319-1795	06/28/21 09:15A	Active	ART03	No		US
833-338-0070	11/04/24 00:00A	Active	ART10	No	B-11-2	US



As previously discussed, three digits in the Area of Service column (AOS) are ambiguous. In the **Search Local Rec** AOS output, a three digit AOS value shown in bold is an Area Code. A three digit value in normal font is a LATA. Thus, in the example above, 908 is an NPA, 228 is a LATA.

When records are displayed using either **Retrieve** or **Retrieve All**, the **Sort By** drop-down is used to control the order of the results. By default, results are ordered by toll free number.

Show Counts find the records matching the search criteria and displays the totals for each record status. This will not display any customer records. The results are displayed as shown in the following:

Active 287272	Hold 4	Old 7197	Saved 16	
Disconnect 6514	Invalid 82	Pending 6	Sending 2193	
Failed 1275	Must Check 4	Rejected 3	Suspend 0	TOTAL 304578

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the **Data Lists** section of the user guide.

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See **Shortcuts** for details.

SCP Status

To the left of the **Toll Free #** field in the results you will see the image . Clicking on this image will produce a popup containing the latest SCP status information for this particular toll-free number's record. For more information, see **SCP Status**.

Toll Free Number/8MS Routing Set Report

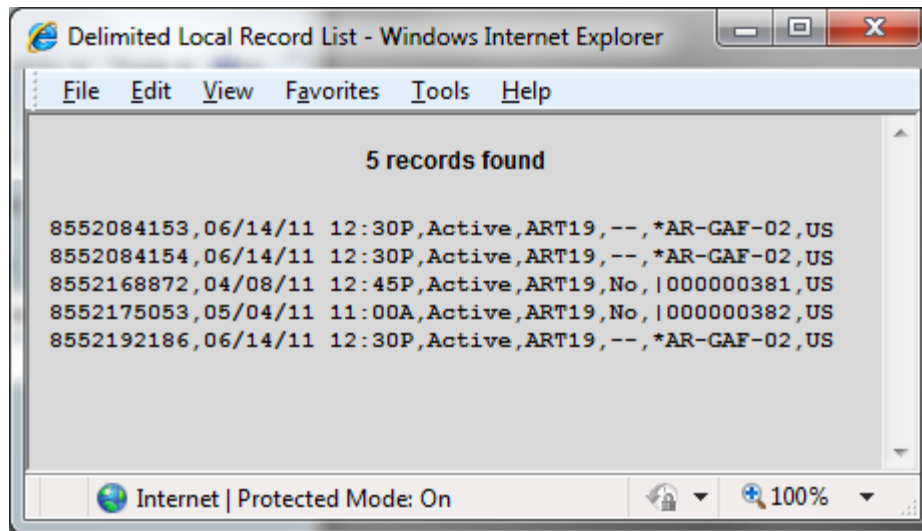
The **8MS Routing Set** or **SMS Template** for a particular toll-free number and date/time shown in the results may appear as a hyperlink. Clicking on the link for an SMS Template or 8MS Routing Set will produce a popup allowing you to generate a pdf report of the selected SMS Template or 8MS Routing Set. For a description of the report and its associated popup, see **Toll Free Number/8MS Routing Set Report**.

Along with the **Retrieve**, **Retrieve All** and **Show Counts** buttons there are several more buttons that provide additional features.

Alternate Result Format

Create Delimited List retrieves all record matching the search criteria. Instead of displaying results in the bottom

frame, a popup is produced containing the retrieved data in a comma-separated format. The popup is depicted below:



This format, useful for import into a spreadsheet for example, is also supported by [Search Local Numbers](#), [Search Local Carrier Express](#) and [Activity Log](#).

Number Lists

[Create Number List](#) allows the results of the search to be placed into a number list. Note that even though multiple records for the same toll free number might be selected, the number will appear in the list only once. Information about the list to be created, such as the list name, is specified on a popup window. See [Number List Popup](#) for more information.



When creating a number list in **Search Local Records**, there is no need to select either **Retrieve** or **Retrieve All** first.

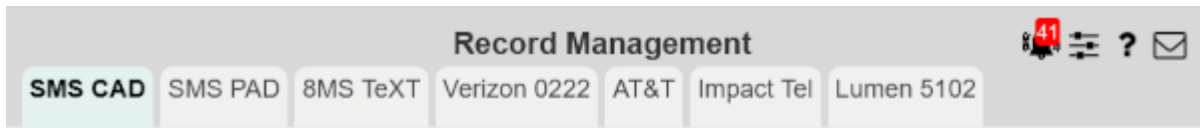
Dynamic List of Numbers

It is also possible to quickly create a dynamic list of numbers (rather than a named Number List) that can be pasted into an 8MS **Numbers** text area for a batch or into any other application on your computer. As noted above, selecting either **Retrieve** or **Retrieve All** will show a list of numbers and associated detail in the lower frame. In the upper left of the lower frame is a checkbox labeled **Numbers Only**. Selecting this checkbox will change the lower frame from a list of detail with a **Number History** link on each number to a simple, text-only list of numbers. This allows the set of numbers found to be easily selected, copied and then pasted wherever you wish.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Search Local Records/Search Local Carrier Express Preferences](#) for details on customizing this screen.

With the introduction of Carrier Express into 8MS it became necessary to provide some graphical mechanism that would allow users to continue to access the existing SMS/800 screens in the usual way while, at the same time, providing easy access to similar screens for carriers supported in Carrier Express. Specifically, users should be able to easily access screens for activating (via **Record Management**) and disconnecting (via **Disconnect**) toll-free numbers. The mechanism provided is a set of simple tabs. One tab is for the existing SMS/800 CAD screen, another is for the new SMS/800 PAD screen and there are additional tabs for each carrier supported in Carrier Express. Below is a screen shot of a typical set of tabs.



Floating over a tab will change the color of the tab. Clicking on a tab will show the provisioning screen for SMS/800 CAD, SMS/800 PAD or the carrier associated with that tab. Users in a company are granted access to the individual tabs. If a company does not use a particular carrier then access to the tab for that carrier will appear dimmed and the users of the company will be unable to access the screen for that tab. Below is a screen shot for a user that does not have access to *Verizon 0222*. The Verizon 0222 tab is dimmed and clicking on that tab has no effect.



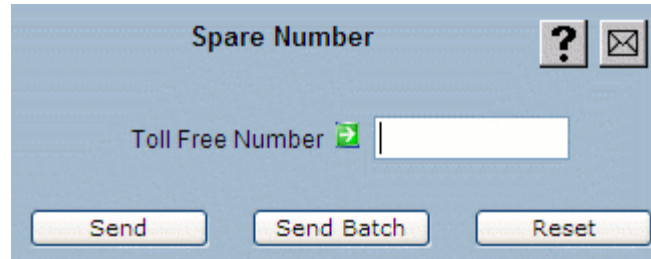
Floating over a dimmed tab will have no effect; nor does clicking on the tab cause any screen changes. It is possible to configure both screens so that unwanted carriers do not appear rather than having them appear as dimmed tabs. This is done by setting the **CadTabs** (for **Record Management**) and **DiscTabs** (for **Disconnect**) preferences. The order of the tabs in these preferences indicates the order the tabs will appear on the screen. Depending on the configuration of your 8MS platform, this may be a User or Company Preference.

It is also possible to specify the default tab (that is, the tab that is selected) when accessing each of these screens. This is done by setting the **CadDefaultTabs** (for **Record Management**) and **DiscDefaultTabs** (for **Disconnect**) preferences.

Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see the appropriate preference keys under the **Record Management Preferences** and the **Disconnect Preferences** for details on customizing these fields.

This function allows you to return a reserved toll free number to SMS/800. You are also able to return a list of reserved numbers (see **Batch Spare** below).

In the menu frame, select the **Spare** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



In the **Toll Free Number** field, enter the number you wish to return to spare. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

Select the **Send** button. A message will appear in the response frame indicating the status of the request.

Batch Spare

This function allows you to return a list of reserved toll free numbers to spare.

Select the **Send Batch** button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This function uses the SMS/800 History database to determine what numbers will be coming spare in the near future. Users may search within a single NPA or across multiple NPAs. SMS/800 wildcard patterns (using * and &) may be entered in the toll-free number field as well as alphabetic characters. A date range may be provided that limits the search to numbers which will become spare within the specified date range.

The search algorithm for this function uses a dictionary of properly spelled words to provide only validly spelled words, if desired. Up to two digits may be added on to the number in an attempt to spell longer words.

Note that the 8MS database is updated from the SMS/800 History database once per day. Therefore, making the same query multiple times per day will always yield the same results.

In the menu frame, select the **Spare # Forecast** link located in the **Number Admin** section of the menu. The screen is divided into two main areas. The top portion allows you to specify the search criteria. This section appears as follows:

The following is a description of the search criteria:

Field	Description
NPA	These checkboxes allows you to limit the search to only the selected NPAs. Selecting the Any checkbox or leaving all checkboxes unselected will search all NPAs.
Earliest/Latest	The Expected Spare Date fields allow you to limit the search to numbers whose spare date falls within the date range specified in the Earliest and Latest date fields. The format of these two fields is MM/DD/YY. Either value may be omitted to select numbers with spare dates after or before a given date.
Number	allows you to search for a particular toll-free number or word appearing in a toll-free number. This field may contain 7 digits to specify a particular number, it may contain the SMS/800 wildcard characters (* and &) to do a pattern search, and it may contain letters of the alphabet to search for

numbers containing particular spelled words. This field may be 0 to 7 characters; fully-qualified numbers do not need to be entered. The NPA is never entered in this field.

Contains	Selecting this radio button indicates that a spelled word may appear anywhere in the number.
Starts With	Selecting this radio button indicates that a spelled word <i>must</i> appear at the start of the number (immediately following the NPA).
Ends With	Selecting this radio button indicates that a spelled word <i>must</i> appear at the end of the number.
Trailing Digits	This drop-down list allows up to two additional digits to be added onto the toll-free number. These digits (which are ignored during dialing) will allow longer words to be spelled during the search.
RespOrg	allows you to find toll-free numbers that are currently owned by the specified RespOrg. The RespOrg field does not have to be fully specified; a partial spelling of the RespOrg may be entered. Any RespOrgs matching the partial RespOrg will be returned. For example, to find toll-free numbers owned by any of the ART** RespOrgs, you could provide a RespOrg of <i>ART</i> .

Once the search criteria have been specified, the search is initiated with one of the following buttons:

Retrieve retrieves all numbers matching the search criteria. The numbers are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves and displays all numbers matching the search criteria. The resulting numbers are not grouped into pages. If many numbers are selected by the given criteria, this may take some time.

The **Retrieve** and the **Retrieve All** results appear in the lower frame as shown in the following:

Record(s): 1 to 15 of 16			Next 1	Last
Toll Free #	Expected Spare Date	Current Resporg		
800-327-2782	05/03/07	ATX01		
800-472-7824	06/02/07	LDD04		
800-847-2782	03/25/07	SPBS5		
866-672-7822	05/22/07	MCI01		
866-727-8262	06/01/07	FDN01		
866-957-2782	04/28/07	AWLD1		
877-617-2782	05/24/07	GTWD2		
877-727-8284	04/01/07	BDL01		
877-772-7822	03/27/07	PKC01		
888-472-7820	05/19/07	SPBS1		
888-727-8214	04/13/07	BDL01		
888-727-8215	04/13/07	BDL01		
888-727-8216	04/13/07	BDL01		
888-727-8273	04/27/07	BDL01		
888-737-2782	06/03/07	LDD04		

When records are display using either **Retrieve** or **Retrieve All**, the **Sort By** drop-down is used to control the order of the results. By default, results are ordered by toll free number. They may also be ordered by RespOrg or Spare Date.

Show Counts finds the numbers matching the search criteria and displays the totals for each toll-free NPA. This will not display any toll free numbers; the lower frame will be cleared. The results are displayed as shown in the following:

800: 3	888: 7	877: 3	866: 3	
				Total: 16

Data List Links

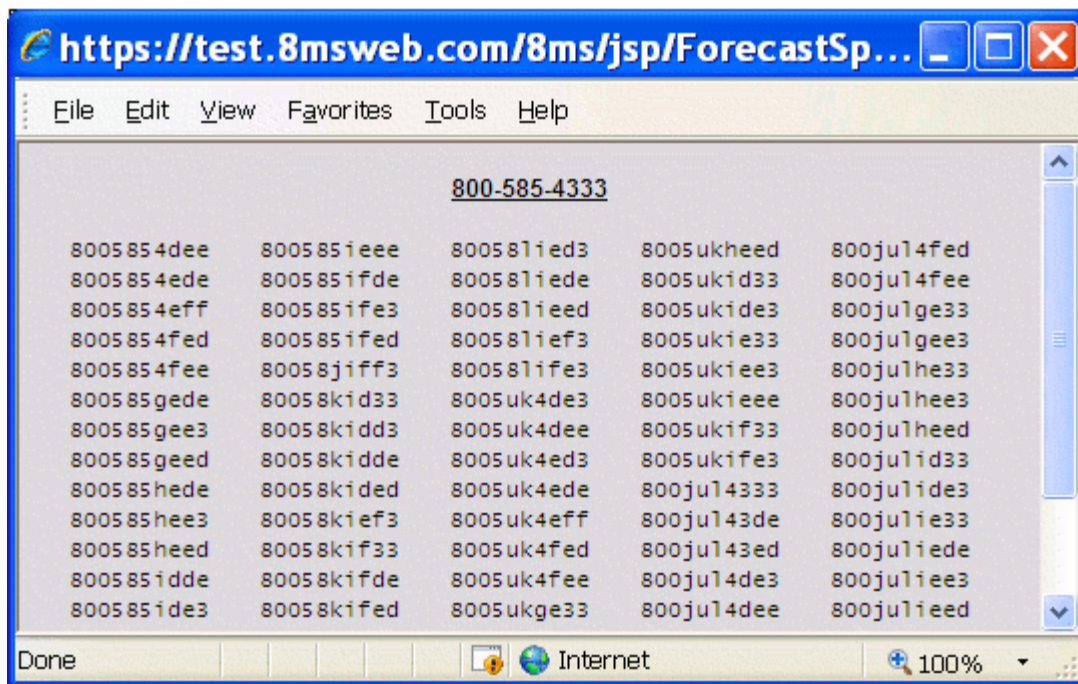
The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the **Data Lists** section of the user guide.

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See **Shortcuts** for details.

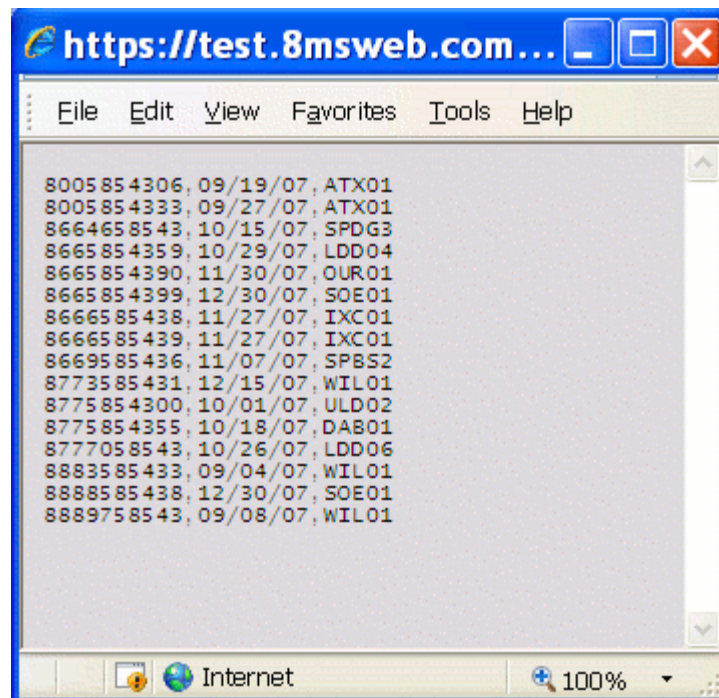
Spelled Word Links

You may notice that the toll free numbers presented in the results frame appear as hyperlinks. Clicking on these links will produce a popup containing all possible word/number combinations for this toll-free number. This popup is depicted below:



Alternate Result Format

Create Delimited List retrieves all numbers matching the search criteria. Instead of displaying results in the bottom frame, a popup is produced containing the retrieved data in a comma-separated format. This popup is depicted below:



This format, useful for import into a spreadsheet for example, is also supported by **Search Local Records** and **Activity Log**.

Number Lists

Create Number List allows the results of the search to be placed into a number list instead of being displayed. Information about the list to be created, such as the list name, is specified on a popup window. See [Number List Popup](#) for more information.



When creating a number list there is no need to select either **Retrieve** or **Retrieve All** first.

Reset puts the search screen back to it's original state, as if you had just selected the **Spare # Forecast** link. The count and results sections will not be cleared so that you may still view your last search results.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Spare # Forecast Preferences](#) for details on customizing this screen.

This function allows you to change the effective date/time for a pending record in SMS/800.

In the menu frame, select the **Transfer** link located in the **Number Admin** section of the menu. The following will appear on the screen:

Enter a number in the **Toll Free Number** field and then hit the TAB key.

Select the effective date/time of the customer record you want to transfer from the **Original Date/Time** drop-down box, or type a date time in the box below.

Enter the new effective date/time in the **New Date/Time** field. The format of this field is MM/DD/YY HH:MMa/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted.

Select the **Send** button. A message will appear in the response frame indicating the status of the request.



If the record to be transferred is a PAD record, the record **MUST** exist on 8MS, or SMS/800 will automatically convert the record from a PAD to a CAD record. To prevent this from occurring, 8MS verifies that the record is local and reports an error to the user if it is not.

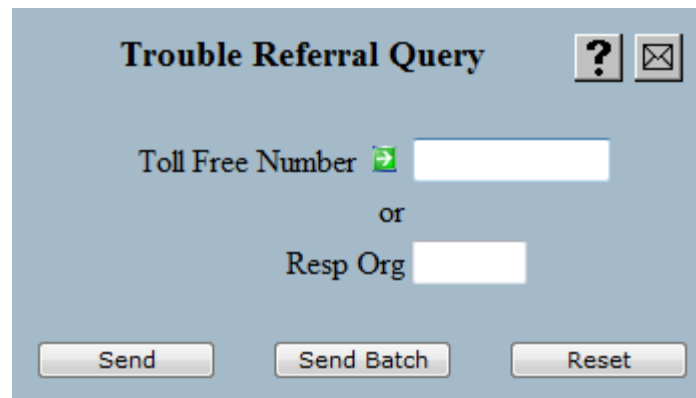
Batch Transfer

This function allows you change the effective date/time for a record in a list of toll free numbers. An attempt will be made to transfer the same record from each number (i.e., the record specified in the **Original Date/Time** field as described above). Requests for numbers that do not contain the specified record will fail.

Select the **Send Batch** button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This function allows you to locate the contact number of a toll free number or of a Resp Org.

In the menu frame, select the **Trouble # Query** link located in the **Number Admin** section of the menu. The following will appear in the workspace frame:



To query for a contact number, you have the option to enter the numeric format of the dialed number by using the **Toll Free Number** field or to enter the Resp Org code by using the **Resp Org** field. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212). The format of the Resp Org name is 5 characters.

Select the **Send** button. A message will appear in the response frame indicating the status of the request.



As of release 9.4, **Trouble Number Query** has been enhanced to provide the most accurate information about a number. As in previous releases, first a **Trouble Referral Query** query is sent to SMS/800. If the number is found then the returned information is displayed. However, if the number is *Reserved* or *Spare* then SMS/800 fails because it finds no records. At this point, 8MS now automatically executes a **Number Query**. If the number *Reserved* then a **Trouble Referral Query** is executed on the owning Resp Org. If the number *Spare*, then that information is shown.

Batch Trouble Number Query

This function allows you to locate the contact number of a list of toll free numbers.

Select the **Send Batch** button. The Batch Popup will appear. See **Batches** in the **Common Features** section for details on the Batch Popup.

This function tries to reinstate the state of an active toll free number with that of the most recent history record of that toll-free number. This can be accomplished for a single number or for a list of numbers.

In the menu frame, select the **Undo Rec Change** link located in the **Number Admin** section of the menu. The following screen will appear in the workspace frame:

The screenshot shows a web form titled "Undo Record Change". It has a light blue background. At the top right, there are two icons: a question mark and an envelope. The form contains three input fields: "Toll Free Number" with a green arrow icon to its left, "Number List" with a dropdown arrow icon to its left, and "Date/Time" with the text "NOW" inside the field. Below the fields are two buttons: "Send" and "Reset".

To undo a record change for a single toll free number, use the **Toll Free Number** field. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212). After entering the toll free number, hit the TAB key.

To undo a record change for a list of numbers, select the list from the **Number List** drop-down.

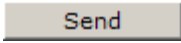
After selecting either a single number or a list of numbers, the bottom portion of the screen will be populated as shown in the following:

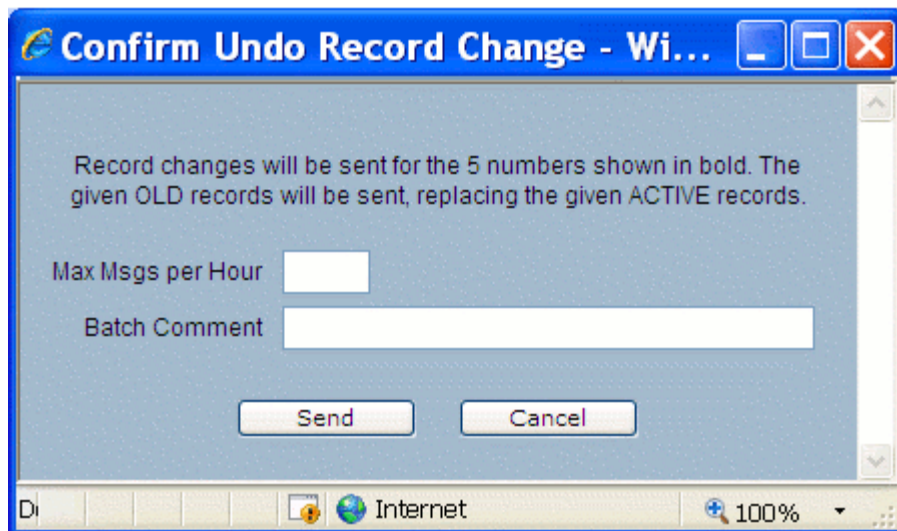
Number	Active Record	Old Record
8002004567	02/04/04 03:00P	02/04/04 01:30P
8002005005	04/15/03 02:00P	No OLD record
8002006590	02/07/04 09:30A	02/06/04 10:30P
8002011664	02/07/04 09:00A	02/04/04 03:15P
8002017205	02/07/04 10:00A	02/07/04 09:00A
8002033515	No ACTIVE record	
8002035419	02/07/04 09:45A	02/04/04 03:45P
8002036187	02/07/04 09:45A	02/04/04 03:30P
8002182192	02/05/04 12:30P	02/03/04 10:15A
8002203450	02/06/04 08:15A	02/03/04 03:30P
8002206224	02/06/04 08:15A	02/03/04 03:30P
8002206839	02/07/04 10:00A	02/07/04 05:45A
8002208033	02/04/04 12:45P	02/03/04 03:30P
8002209850	11/19/03 03:00P	No OLD record
8002223579	02/07/04 10:00A	02/07/04 06:00A
8002229255	02/06/04 05:45P	02/06/04 02:45P

Undo Record Change works by putting back the "newest OLD record" for the number or numbers specified. Each line in the bottom portion of the screen indicates which record, if any, will be put back. Numbers shown

in **bold** have both an ACTIVE record, and an OLD record to restore. Numbers not shown in bold lack either an ACTIVE or an OLD record, and will not be affected by the undo operation.

In the **Date/Time** field, enter the effective date and time on which the customer record should become active. The format of this field is MM/DD/YY HH:MMA/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted. The time is also optional. If a date is entered without a time, then SMS/800 will schedule the activation sometime on the requested date. The keyword **NOW** can also be used to activate the record immediately and is the default value for this screen.

Select the  button to complete the request. The following popup window will be displayed, allowing the user to confirm the proposed changes:



Use the **Max Msgs per Hour** field to limit the number of messages per hour being sent to SMS/800. This is intended to help you avoid exceeding the per Resp Org CPU percent allocation defined by SMS/800. Note that this field may be given a per User or per Company default. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see **MaxMsgsPerHour** under [User Interface Preferences](#) for details on customizing this field.

Use the **Batch Comment** field to enter optional notes that will appear in the **Batch Log**.

Note that regardless of whether a single number or a list of numbers is specified, the undo request will be sent as a batch job. The confirmation window allows a comment for the batch to be supplied. The progress of the request can be tracked using [Batch Log](#).

The **SMS Template Administration** section contains all the functions for provisioning SMS Templates on SMS/800. The following tasks are included in the **SMS Template Administration** section:

SMS Template Management	Create new SMS Templates records and modify existing Pending records.
SMS Template CPR Management	View SMS Template CPRs and delete local CPRs or modify the expiration date of local CPRs.
Copy SMS Template	Easily copy an existing Toll-Free Number record, 8MS Routing Set or SMS Template to an SMS Template.
Delete Local SMS Template	Delete local SMS Templates.
Delete SMS Template from SMS	Delete Pending SMS Template records from SMS/800.
Disconnect SMS Template	Disconnect SMS Template records from SMS/800.
SMS Template History	View the history of an SMS Template.
Query SMS Template	Query the status of SMS Template records on SMS/800.
Retrieve SMS Template	Retrieve SMS Templates from SMS/800.
Search Local SMS Template	View snapshots of SMS Template records based on flexible filtering options.
SMS Template Info	View SMS Templates and associated number counts.
Transfer SMS Template	Modify the date/time of a Pending SMS Template record.

For more information on SMS Templates, see the **SMS Template** definition in the **Terminology** section and the **Managing SMS Templates** tutorial.

This screen allows you to view, create and update SMS Templates (Template Administrative Data or TAD in SMS/800 terminology). SMS Templates define the routing used by toll-free numbers; toll-free numbers point at an SMS Template to specify how to route their calls.

In the menu frame, select the **Template Mgmt** link located in the **SMS Templates** section of the menu.

The screen is divided into two main areas:

- a top frame for pre-populating the routing information from an existing record, and for specifying the SMS Template and effective date/time for the record to be created
- a scrollable lower area containing routing data and service area selection

Select/Schedule

The top section of the **Template Management** screen appears as follows:

The screenshot shows the 'SMS Template Management' interface. It is divided into two main sections: 'Select' and 'Schedule'.
Select Section: Contains fields for 'SMS Template' (a dropdown menu with a green checkmark icon), '8MS Routing Set' (a dropdown menu with a blue arrow icon), 'Toll Free Number' (a text input field with a green arrow icon and a green 'H' icon), and 'Date/Time' (a dropdown menu).
Schedule Section: Contains fields for 'SMS Template' (a dropdown menu with a green checkmark icon), '(select or enter)' (a text input field), 'Date/Time' (a text input field), and a 'High Priority' checkbox.
Buttons: At the bottom right, there are three buttons: 'Send', 'View', and 'Refresh'.
Icons: In the top right corner, there are two icons: a question mark and a mail icon.

At any point you have the option of populating the routing and service area from an existing record. The record may be selected either by choosing an SMS Template from the **SMS Template** list, an 8MS Routing Set from the **8MS Routing Set** list, or by entering a toll-free number using the **Toll Free Number** field. These are the fields located in the left-hand **Select** column. Alternatively, an item need not be selected, and the SMS Template information can be entered "from scratch."

If a toll-free number or SMS Template is selected as the source, the Date/Time list will automatically be populated with all records for that number or SMS Template. A record will be automatically selected and the data associated with that record will be displayed in the scrollable lower area. The record selected is chosen in the following order: ACTIVE, SENDING, most recent PENDING, or most recent OLD.



When populating the data by entering the toll-free number, hit the **TAB** key after typing in the number.

Routing Information

As mentioned above, the SMS Template information is divided into two sections. The first contains routing information, and appears as follows:

Routing Information ●InterLATA Carrier ● IntraLATA Carrier ● Complex Record ●  or enter new plan name Notes ● Description ● **Approval:****Schedule Status:**Contact Name ● Contact Phone ● Resp Org # Lines ●

For a description of each of these fields, see [Number Information](#).



The "dots" provided for the area heading and for the individual fields, serve as indicators of which information will be sent. They give you the ability to send only a subset of fields. A **green** dot indicates that the field will be sent. A **red** dot indicates that the field will NOT be sent. To change the color of the dot for a field just click on the dot. The dot provided for the headings serve as a toggle for all the fields in that heading. If you click a heading's green dot, it will turn all the dots for the fields to red. If you click a heading's red dot, it will turn all the dots for the fields to green. If you have a mixture of red and green dots for the fields, the heading's dot will be yellow.

The second section contains Service Area information, depicted in the following:

Service Area ●

Network ☒ US ☐ XA ☐ XB ☐ XC

State

Area Code

LATA

Labels

The Service Area defines the region(s) from which a toll-free number will receive calls. You have the option to define the Service Area by Network, State, LATA or Area Code. For a detailed description of each of these fields, see [Service Area](#).



To unselect a Network option of **US**, **XA**, **XB**, or **XC**, use the **None** button.

Once the desired information has been specified, and (optionally) a CPR selected, the target customer record information is entered. This is done using the **SMS Template** and **Date/Time** fields in the right-hand **Schedule** column at the top of the screen.



If an SMS Template was selected above, it will automatically be placed in the **Schedule SMS Template** field. You may leave it unchanged to send a new record for the selected SMS Template, or change it to a different SMS Template. This allows you to select the information for one SMS Template and send it for another (i.e., do a copy from one SMS Template to another within the **SMS Template**



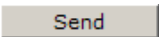
Management screen).

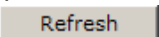
Specifying the Schedule SMS Template may be done by either selecting the name from the **SMS Template** drop-down list or by typing the name in the field labeled **(select or enter)**.

The **SMS Template** name must be 4-15 characters long, the first character must be a '*', the second and third characters must be your company's SMS/800 Entity code (the first two characters of the RespOrg) and all other characters must be alphanumeric or dashes.

In the **Date/Time** field, enter the effective date and time on which the customer record should become active. The format of this field is MM/DD/YY HH:MMa/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted. The time is also optional. If a date is entered without a time, then SMS/800 will schedule the activation sometime on the requested date. The keyword **NOW** can also be used to activate the record immediately.

Below the **Date/Time** field is the **High Priority** checkbox. This checkbox provides access to the SMS/800 *High Priority Update* feature. Selecting this option will tell SMS to place this customer record at the front of the SCP queue. Only a small number of these updates can be done each day. After a high priority change is sent, check the **Activity Log** to see how many such updates remain for the current day.

Select the  button in the non-scrollable area at the top of the screen. A message will appear in the *response frame* (the area below the scrollable Routing Information/Service Area information) indicating the status of the request.

It is possible that the SMS Template you are currently viewing has been modified by another user or by the system. Select the  button to force the screen to repopulate all data for the currently selected SMS Template.

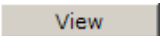
Number History

The **Toll Free Number** field under the **Select** section of the top frame can provide a history of the number entered into the field. Clicking on the  image to the right of the field will produce a popup containing the change history of the selected number. For more information, see [Number History](#).

SCP Status

Between the **Date/Time** label and field on the top frame you may see the image . Clicking on this image will produce a popup containing the latest SCP status information for this particular toll-free number's record. For more information, see [SCP Status](#).

Toll Free Number/8MS Routing Set Report

A pdf report of a toll-free number, 8MS Routing Set or SMS Template may be generated. To see this report for the currently selected item select the  button. For a description of the report and its associated popup, see [Toll Free Number/8MS Routing Set Report](#).

Customization

There are preferences that may be set to change the behavior of this screen. These preferences are shared with the **Record Management: SMS CAD** screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Record Management Preferences](#) for details on customizing this screen.

This function allows you to view, create, edit, and delete complex routing associated with SMS Templates.

In SMS/800, complex routing is tightly coupled with SMS Template records. In 8MS the association is somewhat looser. Complex routing plans are associated with SMS Templates, but exist separately from the SMS Template. These complex routing plans are given user-supplied names when they are created, before they are sent to SMS/800. Complex routing plans that have been created and named but have not yet been sent to SMS/800 are called *Local Plans*. Local plans have names that begin with an alphabetic character.

At some point, a local plan is selected to be sent to SMS/800 as part of an SMS Template record (using [SMS Template Management](#)). Once accepted by SMS/800, a copy of the local plan is made with a new name, and it becomes an *Official Plan*. Official plans have names that begin with a numeric character (in fact, they are named by the effective date/time of the SMS Template record with which they are associated; e.g., **12/15/01-10:00A**). Official plans cannot be changed by the user, nor can they be explicitly deleted. They may be deleted by 8MS only if/when the associated SMS Template record is deleted.

The **SMS Template CPR Management** screen allows complex routing plans to be viewed and possibly changed. To access this screen, select the **Template CPR Management** link located in the **SMS Templates** section of the menu. The following will appear in the workspace frame:

SMS Template CPR Management

SMS Template ☐ Official ☐ Local ☒ Both

Select a plan to view or edit

This screen is divided into two main areas. The top portion allows you to specify the SMS Template for which to view plans. The lower portion is scrollable, and is where the routing plans are listed.

Select the desired SMS Template from the **SMS Template** drop-down list.

Select the plan type to view: Official, Local or Both.

Select the button to retrieve the existing routing plans for the specified SMS Template. The plans for the SMS Template will be displayed in the lower frame as follows:

2 records found

<u>SMS Template Name</u>	<u>Plan Name</u>	<u>Status</u>	<u>Expires</u>	<u>Size</u>
*AR-CSF-01	 06/16/11-07:00A	Active		52
	☐ northeast	Local	10/31/11	52

This example shows both an official and a local plan. The  icon indicates that the official plan cannot be deleted. To delete a local plan, select the appropriate checkbox, and hit the button.

To bring up the graphical routing plan editor for an existing plan, click on its name. You can bring up the plan editor for either official or local plans. The difference is that you will not be able to overwrite an official plan; you may only save it as a new local plan.

If desired, use the button to create a new plan. This will invoke the graphical editor with a blank routing plan.



Unlike local toll-free number routing plans, local SMS Template routing plans are not associated with a specific SMS Template. The drop-down list of Complex Records on the **SMS Template Management** and **Record Management: SMS CAD** screens will show all local SMS Template routing plans.

For instructions on using the graphical editor, see [Editing Complex Routing](#).

Local routing plans may have an expiration date, specified at the time the plan was created. Such plans will have a button in the **Expires** column. In the example above, the local plan has a button with the current expiration date showing. Clicking this button will present a popup allowing the expiration date to be changed:

http://sosadev04d.8msweb.com/8ms/jsp/CprList.jsp;jsessionid=...

<u>SMS Template Name</u>	<u>Plan Name</u>	<u>Expires</u>
	northeast	10/31/11

☐ Never expires
☒ Remove after

Internet | Protected Mode: On

You may either change the existing date, or select **Never expires** to keep the plan indefinitely. Click the

A rectangular button with a light gray background and a thin black border. The text "Set Date" is centered in a dark gray font.

button to save your change.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [CPR Management Preferences](#) for details on customizing this screen.

This function allows you create SMS Template records by copying the data from another SMS Template, an 8MS Routing Set or a toll-free number customer record. All information will be copied unchanged, with the exception of the SMS Template name. The destination SMS Template name will be substituted as appropriate. (To create new (or *custom*) routing, use the [SMS Template Management](#) screen.)

In the menu frame, select the **Copy Template** link located in the **SMS Templates** section of the menu. The following will appear in the workspace frame:

To copy an SMS Template record you must specify a Source Record (to copy from) and the Destination SMS Template (to copy to).



Some of the fields shown above may not be available. Source fields available on this screen are determined by your login permissions.

To specify the Source Record, you can:

- Select an 8MS Routing Set from the **8MS Routing Set** drop-down list.
- Select an SMS Template from the **SMS Template** drop-down list.
- Enter a toll-free number in the **Toll Free Number** field. The format of a number in the **Toll Free Number** field is 10 digits with or without dashes (for example: 8005551212 or 800-555-1212). If the **Date/Time** record selected is a PAD record then the name of the SMS Template pointed at by this record will appear below the **Date/Time** field.



When copying from a toll-free number, hit the **TAB** key after typing in the number. The **Date/Time** drop-down list will be filled with the known records for that number. A record will be automatically selected. The record selected is chosen in the following order: ACTIVE, SENDING, most recent PENDING, or most

recent OLD. If you wish, you may select a different customer record from the list.

If the source record is an SMS Template or a toll-free number PAD record then the notes of the associated SMS Template will appear in the **Template Notes** field below the *Source Record* **SMS Template** drop-down list.

For more information on 8MS Routing Set lists and the **Show All** button, see the [8MS Routing Set](#) overview.



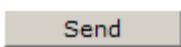
If the specified source is a toll-free number PAD record then the SMS Template pointed at by the PAD record becomes the actual source.

The information to be sent will come from the selected 8MS Routing Set, SMS Template, or customer record of the specified toll free number.

To specify the Destination Template select an SMS Template from the **SMS Template** drop-down list. When the SMS Template is selected the SMS Template notes will appear in the **Template Notes** field below the *Destination Template* **SMS Template** drop-down list.

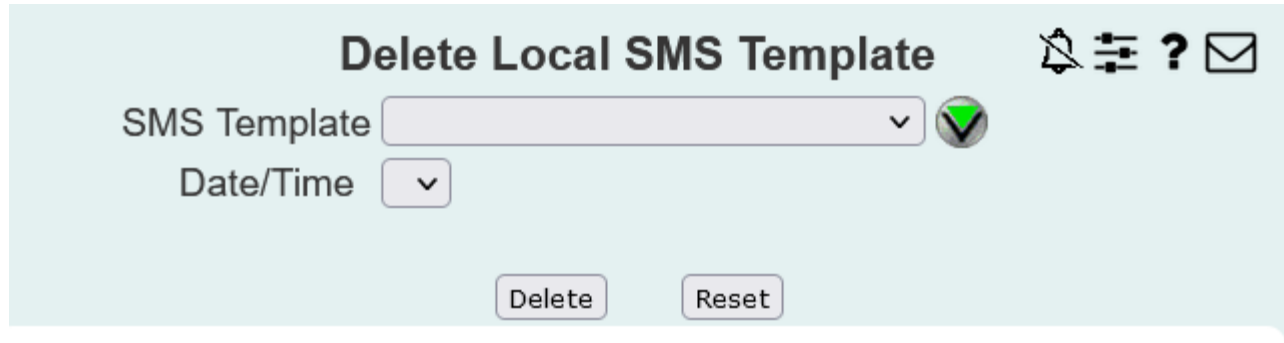
In the **Date/Time** field, enter the effective date and time at which the SMS Template record will become active. The format of this field is MM/DD/YY HH:MMA/Z (or P/Z) or the keyword NOW (which is pre-filled as the default).

Next to the **Date/Time** field is the **High Priority** checkbox. This checkbox provides access to the SMS/800 *High Priority Update* feature. Selecting this option will tell SMS to place this SMS Template record at the front of the SCP queue. Only a small number of these updates can be done each day. After a high priority change is sent, check the [Activity Log](#) to see how many such updates remain for the current day.

Select the  button. A message is immediately sent to SMS/800; when the response comes back it will show the request status in the response frame.

This function allows you to delete local information associated with SMS Templates. Information is deleted from the local 8MS database only; no messages are sent to SMS/800. This function is generally not needed, but is sometimes useful to ensure the state of the 8MS database matches that of SMS/800.

In the menu frame, select the **Delete Local Template** link located in the **SMS Template** section of the menu. The following will appear in the workspace frame:

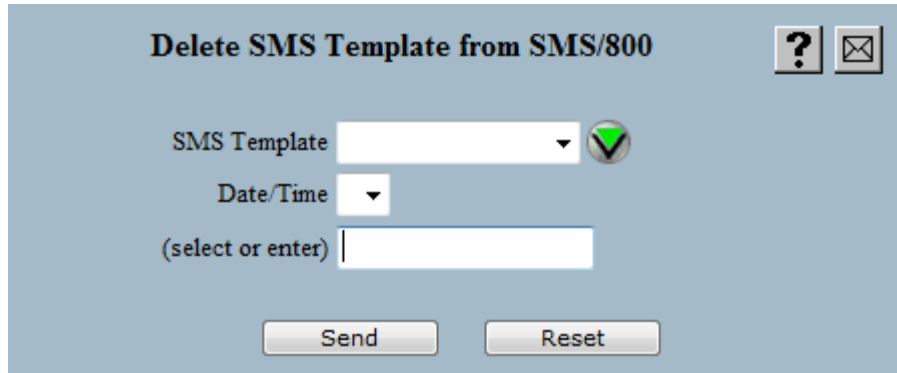


The screenshot shows a light blue dialog box titled "Delete Local SMS Template". In the top right corner, there are four icons: a bell, a list, a question mark, and an envelope. Below the title, there are two dropdown menus. The first is labeled "SMS Template" and has a green checkmark icon to its right. The second is labeled "Date/Time" and has a downward arrow icon. At the bottom of the dialog, there are two buttons: "Delete" and "Reset".

To delete a local SMS Template, choose the SMS Template name from the **SMS Template** drop-down. To delete a single record of that SMS Template, select the date/time from the **Date/Time** drop-down, otherwise leave the **Date/Time** drop-down empty. Finally, select the **Delete** button to delete the specified SMS Template record(s).

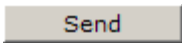
This function allows you to delete a single record for an SMS Template. Only non-ACTIVE records can be deleted from SMS/800.

In the menu frame, select the **Delete Template from SMS** link located in the **SMS Templates** section of the menu. The following will appear in the workspace frame:

The screenshot shows a web form titled "Delete SMS Template from SMS/800" in a blue header bar. In the top right corner of the header are two icons: a question mark and a close button. The form contains three input fields: "SMS Template" (a dropdown menu with a green checkmark icon to its right), "Date/Time" (a dropdown menu), and a text field labeled "(select or enter)". At the bottom of the form are two buttons: "Send" and "Reset".

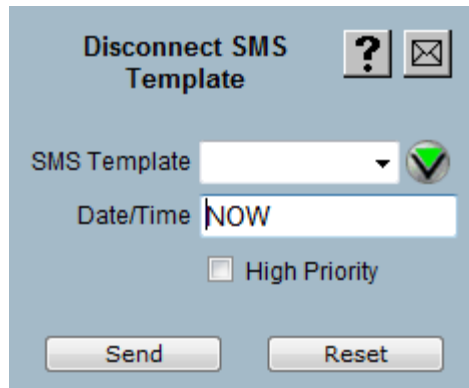
To delete the SMS/800 Template record, choose the SMS Template name from the **SMS Template** drop-down.

Selecting an SMS Template causes the **Date/Time** drop-down list to populate with all known date/time records. Select the effective date/time of the SMS Template record you want to delete from the **Date/Time** drop-down list, or type a date time in the text field below, labeled **(select or enter)**. The format of this field is MM/DD/YY HH:MMa/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted.

Select the  button. A message will appear in the response frame indicating the status of the request.

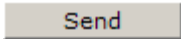
This screen allows you to disconnect SMS Templates from SMS/800. In order to disconnect an SMS Template, no toll-free numbers may be pointed at the SMS Template.

In the menu frame, select the **Disconnect Template** link located in the **SMS Templates** section of the menu. The following will appear in the workspace frame:

The screenshot shows a web form titled "Disconnect SMS Template". At the top right of the form are two icons: a question mark and an envelope. Below the title, there is a label "SMS Template" followed by a dropdown menu and a green checkmark icon. Below that is a label "Date/Time" followed by a text input field containing the word "NOW". Underneath the date field is a checkbox labeled "High Priority". At the bottom of the form are two buttons: "Send" and "Reset".

Choose the SMS Template name from the **SMS Template** drop-down. Enter the scheduled disconnect **Date/Time**. The value entered will be the effective date/time of the disconnect record. When this date/time is reached, the SMS Template will go to the Disconnect status. The keyword **NOW** can also be used to specify an immediate disconnection.

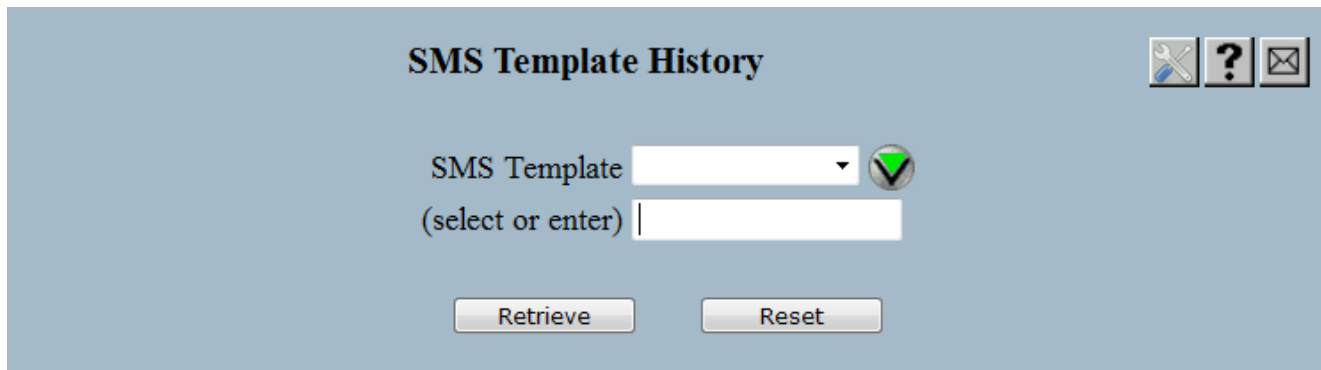
Below the **Date/Time** field is the **High Priority** checkbox. This checkbox provides access to the SMS/800 *High Priority Update* feature. Selecting this option will tell SMS to place this record at the front of the SCP queue. Only a small number of these updates can be done each day. After a high priority change is sent, check the [Activity Log](#) to see how many such updates remain for the current day.

Select the  button. A message will appear in the response frame indicating the status of the request.

SMS/800 maintains a database of the change history of all SMS Templates. Any time a change is made, an entry is made noting the date/time of the change and the login ID used to make the change. The information in the SMS history database is updated nightly. Thus, a change may take up to a day to be reflected in the history DB.

This screen allows you to view the change history that has occurred on a specific SMS Template.

In the menu frame, select the **Template History** link located in the **SMS Templates** section of the menu. The following will appear in the workspace frame:



Either select a template in the **SMS Template** drop-down list or enter one in the field labeled **(select or enter)**.

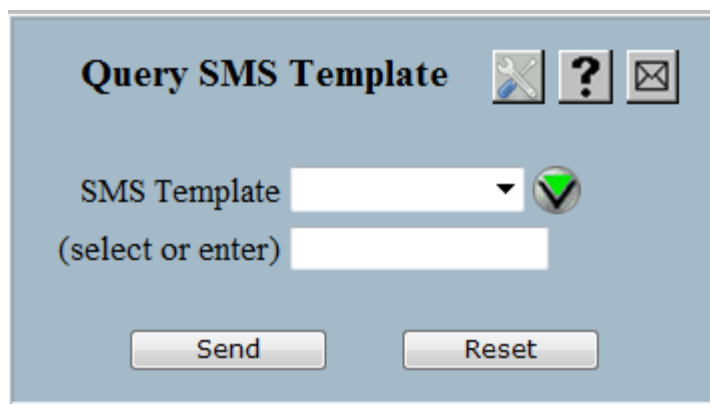
Select the **Retrieve** button. The change history of the given SMS Template will appear in the lower part of the screen:

History for *AR-MJL-0007 Note: History data can be up to a day old

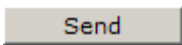
<u>Activity Date</u>	<u>Status</u>	<u>Effective Date</u>	<u>Control RespOrg</u>	<u>Extract Date</u>
06/11/2013 09:34:59:173	PENDING	11/11/2013 23:30:00	ART34	06/12/2013 00:01:00
06/11/2013 09:34:59:139	SAVED	11/11/2013 23:30:00	ART34	06/12/2013 00:01:00
06/11/2013 09:34:37:311	OLD	06/06/2013 09:00:00	ART34	06/12/2013 00:01:00
06/11/2013 09:34:37:291	ACTIVE	06/11/2013 09:30:00	ART34	06/12/2013 00:01:00
06/11/2013 09:34:34:957	SENDING	06/11/2013 09:30:00	ART34	06/12/2013 00:01:00
06/11/2013 09:34:29:109	PENDING	06/11/2013 09:30:00	ART34	06/12/2013 00:01:00
06/11/2013 09:34:28:207	SAVED	06/11/2013 09:30:00	ART34	06/12/2013 00:01:00
06/06/2013 09:11:31:544	OLD	03/01/2012 08:00:00	ART34	06/07/2013 00:01:00
06/06/2013 09:11:31:543	ACTIVE	06/06/2013 09:00:00	ART34	06/07/2013 00:01:00
06/06/2013 09:11:28:869	SENDING	06/06/2013 09:00:00	ART34	06/07/2013 00:01:00
06/06/2013 09:11:28:603	PENDING	06/06/2013 09:00:00	ART34	06/07/2013 00:01:00

This function allows you to query SMS/800 for the status of all records of a particular SMS Template.

In the menu frame, select the **Query Template** link located in the **SMS Templates** section of the menu. The following will appear in the workspace frame:

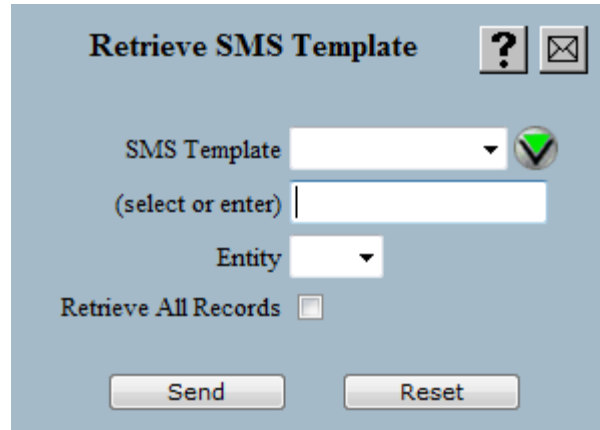
A dialog box titled "Query SMS Template" with a light blue background. In the top right corner, there are three icons: a wrench and screwdriver, a question mark, and an envelope. Below the title, there is a label "SMS Template" followed by a white dropdown menu with a black arrow pointing down. To the right of the dropdown is a green checkmark icon. Below the dropdown is the text "(select or enter)" followed by a white text input field. At the bottom of the dialog, there are two buttons: "Send" and "Reset".

To query an SMS Template, either select it from the **SMS Template** drop-down list or enter it in the field labeled **(select or enter)**.

Select the  button. A message will appear in the response frame indicating the status of the request.

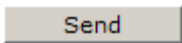
This function allows you retrieve SMS/800 data for an SMS Template and store it in the 8MS database. This function is generally not needed, but may be sometimes be used to synchronize the 8MS and SMS/800 databases.

In the menu frame, select the **Retrieve Template** link located in the **SMS Templates** section of the menu. The following will appear in the workspace frame:

The screenshot shows a web form titled "Retrieve SMS Template" with a question mark icon and an envelope icon in the top right corner. The form contains the following elements: a "SMS Template" dropdown menu with a green checkmark icon to its right; a text input field labeled "(select or enter)" below the dropdown; an "Entity" dropdown menu; a "Retrieve All Records" checkbox; and two buttons at the bottom labeled "Send" and "Reset".

Users may retrieve a specific SMS Template or all templates belonging to their SMS/800 Entity. To retrieve a specific SMS Template select the SMS Template name from the **SMS Template** drop-down list or type it in the field labeled **(select or enter)**. To retrieve all templates within an Entity select the Entity from the **Entity** drop-down list.

Select the **Retrieve All Records** checkbox if you want to force all records to be retrieved. An 8MS system parameter may be set to not retrieve OLD records, for example. This checkbox overrides the parameter.

Select the  button. A message will appear in the response frame indicating the status of the request.

This function allows you to search SMS Template data based on a variety of criteria. The result of the search can be counts of records by status, a list of matching records, or a comma-separated list.

In the menu frame, select the **Search Local Template** link located in the **SMS Templates** section of the menu. The screen is divided into two main areas. The top portion allows you to specify the search criteria. This section appears as follows:

Search Local SMS Templates

RespOrg is not ☐ ☐ Show CIC Any Start Date End Date

AOS Any

Status is not ☐

Active ☐ Old ☐ Saved ☐ Must Check ☐ Rejected ☐

Disconnect ☐ Invalid ☐ Pending ☐ Sending ☐ Failed ☐

☐ Latest Date

Sort by

SMS Template is not ☐

The following is a description of the search criteria:

CIC

Field	Description
RespOrg	Search for records belonging to a given RespOrg. The is not checkbox selects records that do not belong to the given RespOrg.
Start Date - End Date	Search for records whose effective dates fall within the given range. Either value may be omitted to select records with effective dates after or before a given value. Search for records that use one or more particular CIC codes. Use of a CIC code means the CIC appears either as a primary carrier in the CAD, or somewhere in the CPR (if any). CIC codes must be three or four digit values, separated by commas. The type of CIC query is defined using the drop-down list to the right: • Any: matches records that have any of the given CICs (and possibly others) • All: matches records that have all of the given CICs (and possibly others) • Exact: matches records that have all of, and only, the given CICs • Not: matches records that have none of the given CICs
Show CIC	Controls whether or not CIC information is shown for a Retrieve or Retrieve All . This option is provided since retrieving CIC information for many records is time-consuming. User may not want to spend the time if not interested in the CIC data. If a search based on CIC is performed (as described above), then Show CIC is implied.
AOS	Search for records based on the Area of Service in the CAD. The field value is

a comma-separated list of network codes, NPAs, LATAs, or state codes.

Since three digits for an AOS value can mean either a LATA or an NPA, use either an **L** or an **N** to disambiguate. For example, **L434** means LATA **434**; **N732** means NPA **732**.

The type of AOS query is defined using the drop-down list to the right:

- **Any:** matches records that have any of the given AOS values (and possibly others)
- **All:** Matches records that have all of the given AOS values (and possibly others)
- **Exact:** matches records that have all of, and only, the given AOS values
- **Not:** matches records that have none of the given AOS values

Status Search for records whose status matches any of the selected values. The **Select All** and **Select None** buttons are provided for quick selection. The **is not** checkbox selects records whose status is not any of those selected.

Latest Date Normally, if an SMS Template has multiple records, they are all displayed. If the **Latest Date** checkbox is selected, only the one record with the latest date will be displayed for any given SMS Template.

SMS Template Search for records in the given SMS Template. The **is not** checkbox selects records not in the given SMS Template.

These criteria can be combined to form more complex queries. For example, you may want to know all of the customer records for a specific RespOrg that have an ACTIVE status.

Once the search criteria are specified, the search is initiated with one of the following four buttons:

Retrieve retrieves all records matching the search criteria. The SMS Templates are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves and displays all records matching the search criteria. The resulting records are not grouped into pages. If many records are selected by the given criteria, this may take some time.

The **Retrieve** and the **Retrieve All** results appear in the lower frame as shown in the following:

Records per Page 15		Set	Revert	Show Filters		
Record(s): 1 to 15 of 178		Page 1 2 3 4 5 6 7 8 of 12			Next 15	Last
SMS Template	Date/Time	Status	Resporg	CPR?	AOS	
 *AR-5050SPLIT	09/30/11 02:30P	Active	ART71	Yes	US	
 *AR-818-LARGE	08/18/11 05:15P	Active	ART06	Yes	XC	
 *AR-818-TESTFIX	08/18/11 05:15P	Active	ART06	Yes	XC	
 *AR-ACLINETST	09/23/11 08:45A	Active	ART71	Yes	XC	
 *AR-ALL-ATT	09/29/11 10:30A	Active	ART71	No	US	
 *AR-ALLOC	10/24/11 11:00A	Failed	ART71	Yes	XC	
 *AR-ALLVERIZON	09/29/11 10:30A	Active	ART71	No	US	
 *AR-API-0001	11/01/11 06:15A	Disconnected	ART34	No	US	
 *AR-API-0326	10/25/11 06:15A	Disconnected	ART34	No	US	
 *AR-API-0330	10/17/11 10:30A	Disconnected	ART34	No	US	
 *AR-API-0332	10/14/11 08:30A	Sending	ART34	Yes	US	
 *AR-API-0335	10/17/11 10:30A	Disconnected	ART34	No	US	
 *AR-API-0337	10/18/11 06:00A	Disconnected	ART34	No	US	
 *AR-API-0340	10/18/11 06:00A	Disconnected	ART34	No	US	
 *AR-API-0341	10/17/11 10:30A	Disconnected	ART34	No	US	



As previously discussed, three digits in the Area of Service column (AOS) are ambiguous. In the **Search Local Rec** AOS output, a three digit AOS value shown in bold is an Area Code. A three digit value in normal font is a LATA. Thus, in the example above, 908 is an NPA, 228 is a LATA.

When records are display using either **Retrieve** or **Retrieve All**, the **Sort By** drop-down is used to control the order of the results. By default, results are ordered by SMS Template.

[Show Counts](#) find the records matching the search criteria and displays the totals for each record status. This will not display any customer records. The results are displayed as shown in the following:

Active 41	Old 31	Saved 0	Disconnect 0	
Invalid 0	Pending 0	Sending 0	Failed 0	
Must Check 0	Rejected 0			TOTAL 72

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the **Data Lists** section of the user guide.

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See **Shortcuts** for details.

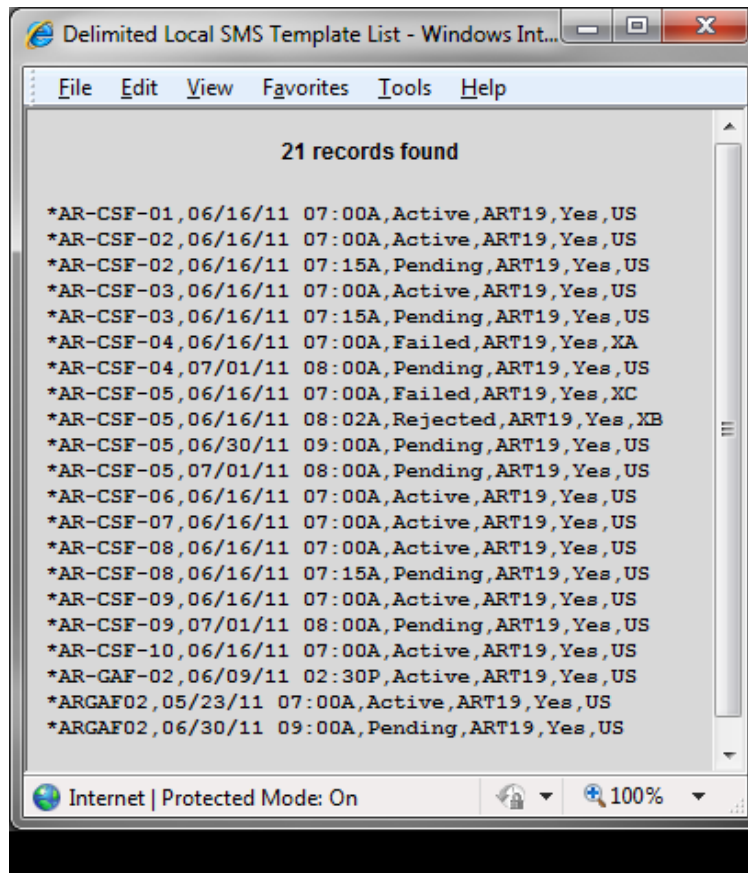
SCP Status

To the left of the **SMS Template** field in the results you will see the image . Clicking on this image will produce a popup containing the latest SCP status information for this particular SMS Template's record. For more information,

see [SCP Status](#).

Alternate Result Format

[Create Delimited List](#) retrieves all records matching the search criteria. Instead of displaying results in the bottom frame, a popup is produced containing the retrieved data in a delimiter separated format. The popup is depicted below:



This format, useful for import into a spreadsheet for example, is also supported by [Search Local Numbers](#), [Search Local Records](#), [Search Local Carrier Express](#) and [Activity Log](#).

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Search Local Records/Search Local Carrier Express Preferences](#) for details on customizing this screen.

This function allows you to view information about SMS Templates. For more information on SMS Templates, see the overview in the [SMS Template Administration](#) section as well as the SMS Templates tutorial in the [Managing SMS Templates](#) section.

In the menu frame, select the **Template Info** link located in the **SMS Templates** section of the menu. The following will appear on the screen:

- a top area for the SMS Template selection criteria
- a bottom area for displaying SMS Template information according to the selection criteria

The top area of **SMS Template Info** appears as follows:

The screenshot shows the 'SMS Template Info' form. It includes several dropdown menus: 'SMS Template' (with a green checkmark icon), 'Number List' (with a red checkmark icon), 'Entity', and 'Company'. Below these are input fields for 'Min' and 'Max' values, and a checkbox for 'Show Number Count'. There are also radio buttons for 'Show SMS Template' with options 'All' (selected), 'BR', and 'Not BR'. A 'Sort by name (ascending)' dropdown is on the right. At the bottom are buttons for 'Retrieve', 'Retrieve All', 'Create Number List', 'Delete', and 'Reset'.

This screen allows SMS Template selection criteria to be specified. This criteria selects SMS Templates to be viewed (using either **Retrieve** or **Retrieve All**). The following describes the selection criteria:

Field	Description
SMS Template	A particular SMS Template can be selected from the SMS Template drop-down list. See the SMS Template Administration overview for information on SMS Template lists and the Show All button.
Number List	This option will select only those SMS Templates used by the numbers in the given list.
Entity	This option will select only those SMS Templates belonging to the specified Entity.
Company	This option will select only those SMS Templates within the specified Company. This field will only appear for privileged companies.
Show Number Count	This checkbox will report the number of toll free numbers that point at each SMS Template. This is implemented as an option because the

time required to produce per-SMS Template counts is much greater.

Min/Max These two fields may be used to limit the search (e.g., find only those SMS Templates that have 1 or 2 numbers pointing at them).

Show SMS Template These radio buttons control selection of SMS Templates based on their names.

- **All** Show all SMS Templates.
- **BR** Show SMS Templates gained through a Resp Org change.
- **Not BR** Don't show SMS Templates gained through a Resp Org change.



SMS Templates gained through a Resp Org change have a name in which the 4th and 5th characters are "BR".

Once the selection criteria have been set, use either the **Retrieve** or **Retrieve All** button to retrieve the SMS Template information. **Retrieve** will limit the number of SMS Templates displayed per page, and allow moving between pages. **Retrieve All** will retrieve all appropriate SMS Templates as one large list. The report will resemble the following:

Record(s): 1 to 5 of 9			Page 1 2 of 2		Next 4	Last
Name	Resp Org	# Count				
*AR-GAF-01	ART19	22				
*AR-TMPL-05	ART19	163				
*AR-TMPL-09	ART19	100				
*AR-TMPL-11	ART19	50				
*AR-TMPL-12	ART19	50				

Each row of output shows the SMS Template name, the Resp Org associated with this SMS Template, and the count of toll free numbers pointing at the SMS Template (assuming **Show Number Count** was selected).

The drop-down below the **Show Number Count** controls the sorting of the retrieved SMS Template data. There are currently four options, allowing sorting by name or number count, either ascending or descending.

Since it is sometimes necessary to see what toll free numbers are affected, you may create a number list to view in **Search Local #** or **Search Local Rec**. If you would like to create a number list, select the **Create Number List** button. The standard number list creation popup will appear. Create the number list as you would normally. See **Number List Popup** for more information.

The **Search Local SMS Templates** screen can be used to find more information about a particular SMS Template.

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the **Data Lists** section of the user guide.

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See **Shortcuts** for details.

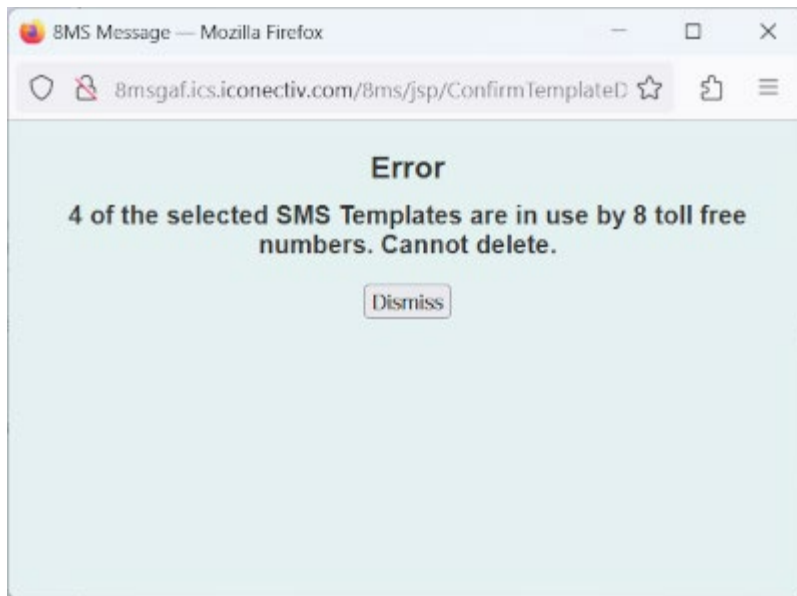
Deleting SMS Templates

If the delete button is used instead of a retrieve button, then a request to delete SMS Templates is made. The SMS Templates to be deleted are those that are specified by the selection criteria in the top section (i.e. those that would otherwise be retrieved).

A request to delete one or more SMS Templates will result in a confirmation window:



An SMS Template which has Active or Sending records pointing at that Template may not be deleted. If a user attempts to delete an SMS Template meeting this condition the following message will appear.



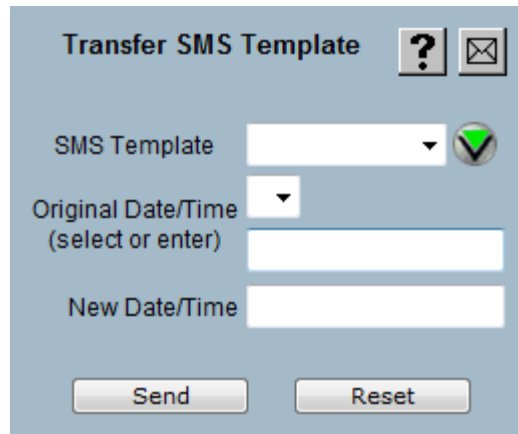
The **Search Local Templates** screen can be used to find the records pointing to a particular SMS Template.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **SMS Template Info Preferences** for details on customizing this screen.

This function allows you to change the effective date/time for a pending record in SMS/800.

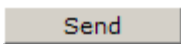
In the menu frame, select the **Transfer Template** link located in the **SMS Templates** section of the menu. The following will appear on the screen:



Choose the SMS Template name from the **SMS Template** drop-down.

Select the effective date/time of the customer record you want to transfer from the **Original Date/Time** drop-down box, or type a date time in the box labeled **(select or enter)**.

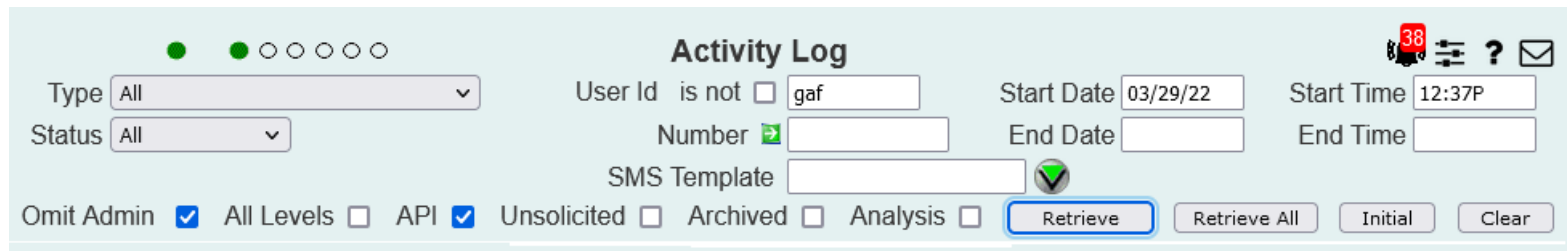
Enter the new effective date/time in the **New Date/Time** field. The format of this field is MM/DD/YY HH:MMa/z, where *a* is **A** or **P**, and *z* is the time zone. Time zone is optional and is presumed to be Central time if omitted.

Select the  button. A message will appear in the response frame indicating the status of the request.

The following tasks are included in the System Activity function.

Activity Log	View User activity with filtering on Toll-Free Numbers, SMS Templates and other fields.
Batch Log	View scheduled, completed and in-progress Batch activity.
Company Preferences	View and set Company-level preferences.
NPANXX Carrier Map	View and download billing invoices in pdf format.
Reports	View reports on system data. This includes API Types, Company, Params Preferences, User Types, and Users.
SMS/800 Contacts	View the SMS/800 Primary Resp Org and Change Resp Org contacts.
Termination Defaults	View and set Termination default values, which are used on the Record Management: SMS CAD screen.
Upload AT&T Auth Form	View Company Transaction information.
Usage Counts	View Company Transaction information.
User Preferences	View and set User-level preferences.
Welcome Page	The Welcome screen shows system messages and provides a link to the Release Notes.
Customizing 8MS	The 8MS user interface is customizable. This section explains how to set Company and User Preferences. All Preferences and descriptions are listed.

This function allows you to search log of the system activity based on various criteria. To access this screen, select the **Activity Log** link located in the **System Activity** section of the menu. The screen is divided into three main areas. The top portion allows you to specify criteria on which to search as depicted in the following:




The colored dots in the upper left provide a visual state of the communication links to various systems. The left set shows Carrier Express links and the right set shows Somos Registry links. A **green** dot indicates that a link is working. A **red** dot indicates that a link is down. A clear dot indicates a link that has not been provisioned. If you hover your mouse over a dot a hint will appear indicating the system this dot relates to and an identifier within that system. Additional communication link information is available on the **TFNR Link Status** and **CarExp Link Status** screens under the **Tools** menu.

The following is a description of the search criteria:

Field	Description
Type	search for system activities for a particular type of activity. Select the desired activity type from the drop-down list. If you do NOT want to filter according to type of activity, then select All from the list.
Status	Search for system activities that have a particular status. Select the status from the drop-down list. If you do NOT want to filter according to status of activity, then select All .
User Id	Select activity for a particular user. The ability to examine other users' activity is an 8MS permission, thus may not be available to all users. Selecting the is not checkbox to the left of the User Id field will show all user activity except the entered user.
Toll Free Number	Search for all activity for a given toll-free number. Note that filtering by toll free number implies the All Levels option (described below).
SMS Template	Search for all activity for a given SMS Template.
Start Date - End Date	Search for activity entries whose date falls within the given range. Either value may be omitted to select activity with dates after or before a given value.
Start Time - End Time	Search for system activities by date AND time. The Start Time field can be used only if a Start Date has been specified. The End Time field can be used only if an End Date has been specified. When a start/end date has been specified, but no start/end time has been specified, the time is defaulted to midnight of the specified date.
Omit Admin	Administrative activity includes items such as users logging in, user and company maintenance, and similar actions. When this checkbox is checked, admin activity is ignored, so you will only see activity that primarily involves communications with SMS/800, Carrier Express or other external systems, but also includes other activity that is likely to be of interest to the user (e.g. pdf reports). The ability to view other than SMS activity is an 8MS permission, thus may not be available to all users.

All Levels Display all messages associated for a system activity in the results. When this option is not checked, only one line appears in the output for each request. When **All Levels** is selected, each SMS/800 message required to implement the request will be listed as a separate item in the resulting output.



The **Show All Levels** checkbox is useful for displaying all the messages related to a batch activity, but can result in many items being displayed.

API 8MS provides an Application Programmer Interface (API) that allows 8MS companies to write client applications that communicate directly with 8MS, bypassing the user interface. When this checkbox is checked, API messages are shown along with non-API messages. When this checkbox is not checked, API messages are not shown.

Unsolicited Include unsolicited messages from SMS/800 in the result. Unsolicited messages are those messages not directly connected with a particular user request. Two examples are activation of a customer record, and notification of a Resp Org change by another carrier. Unsolicited messages are stored in the Activity Log with a user id of **SMS/800**.

Archived 8MS maintains two sets of user activity data. The first set is recent activity and typically covers the last 30-60 days (the number of days is tunable per 8MS platform). The second set is data older than the recent activity and is typically 180 days beyond the recent activity (but is also tunable per 8MS platform). The older data is referred to as archived data. When the *Archived* checkbox is not checked, which is the default behavior, users will view/search the recent activity. If the checkbox is checked, users will view/search the archived data.



For performance reasons, it is not possible to view/search both recent and archived data; only one set or the other may be accessed at one time.

Analysis Include messages generated by 8MS involving the routing analysis of customer records for the purpose of 8MS Routing Set maintenance.



Upon initial display, the **User Id** field will be populated with the current login, the **Start Date** field will be filled with the current date, and the **Start Time** field will contain the current time minus one hour. Thus, by default, **Activity Log** will show you everything you've done in the past hour.

These criteria can be used together to search for system activities. For example, you may want to know all of the activities for a particular User ID on a specific date.

The **Initial** button is used to reset the filter to the state that exists when **Activity Log** is first selected (that is, SMS/800 activity for the current user over the last hour).

The **Clear** button is used to clear all selection criteria to select all activity.



Clearing all filters may result in many activity entries being returned, and may take a very long time.

Once you are satisfied with your selection criteria, begin your search by clicking on one of the following buttons:

Retrieve retrieves all records matching the search criteria. The results are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves all records matching the search criteria. The results are not grouped into pages. If many records are selected by the given criteria, this may take some time.

The **Retrieve** and the **Retrieve All** results will be displayed in the middle frame as shown in the following:

		Records per Page		16	Set	Revert	Show Filters		
First	Previous 16	Record(s): 33 to 48 of 106			Page 1 2 3 4 5 6 7 of 7			Next 16	Last
Type	Status	Number	SMS Template	Date	User Id	Abstract			
● TRQ	Success			06/22/12 07:24A	gaf	Trouble referral number query.			
● Num Query	Success	855-203-7718		06/22/12 07:24A	gaf	Number query.			
● TRQ	Failure	855-203-7718		06/22/12 07:24A	gaf	Trouble referral number query.			
○ Carrier Exp Activate	Waiting	855-210-1039		06/21/12 09:41A	gaf	Activate at carrier GlobalCrossing.			
● Num Query	Failure	800-123-4567		06/21/12 09:02A	gaf	Number query.			
● TRQ	Failure	800-123-4567		06/21/12 09:02A	gaf	Trouble referral number query.			
● TRQ	Success	800-555-1212		06/21/12 09:02A	gaf	Trouble referral number query.			
● SMS Template Query	Success		*AR-GAF-99	06/21/12 08:49A	gaf	SMS template status query.			
○ Carrier Exp Activate	Waiting	855-210-1039		06/20/12 11:02A	gaf	Activate at carrier GlobalCrossing.			
○ Carrier Exp Divcode Chg	Waiting	855-210-1039		06/20/12 10:58A	gaf	Divcodechange at carrier GlobalCrossing.			
● Carrier Exp Divcode Chg	Error			06/20/12 10:55A	gaf	Carrier Express Divcode Change.			
○ Carrier Exp Acct Chg	Waiting	855-210-1039		06/20/12 10:54A	gaf	Accountchange at carrier GlobalCrossing.			
○ Carrier Exp POTS Chg	Waiting	855-210-1039		06/20/12 10:53A	gaf	Potschange at carrier GlobalCrossing.			
○ Carrier Exp Activate	Waiting	855-210-1039		06/20/12 09:19A	gaf	Activate at carrier GlobalCrossing.			
○ Carrier Exp Divcode Chg	Waiting	855-210-1039		06/20/12 09:02A	gaf	Divcodechange at carrier GlobalCrossing.			

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the **Data Lists** section of the user guide.

Item Detail

You can click on any column of an activity listed to obtain detail about that activity. The detail is displayed in the lower frame as shown in the following:

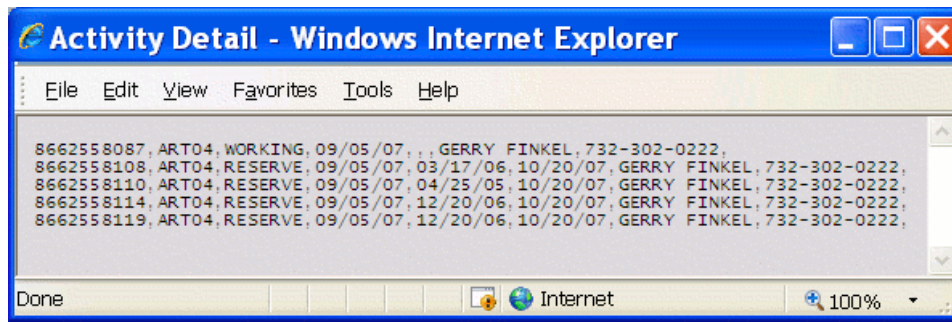
Type: Num Query	Version: 9.4.70
Status: Success	User ID: gaf / csf Corporation
Date/Time: 06/22/12 07:24A	IP Addr: 192.80.23.60
Number: 855-203-7718	
Abstract: Number query.	
Resp Org: ART19	
Status: RESERVE	
Status Date: 06/20/12	
Reserved Until: 08/04/12	
Contact Name: GERRY FINKEL	
Contact Phone: 908-732-8048	

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See **Shortcuts** for details.

Alternate Detail Format

The  icon may appear for certain activity log entries. This icon indicates that an alternate detail format is available for that entry. This format, displayed in a popup windows, presents the detail in a manner more suited for import into other programs (such as a spreadsheet). Rather than being user-friendly, it presents the raw data separated by some delimiter. For example, the following is the alternate format of batch number query detail:



Currently, this alternate format is only available for the following activity:

- **Number Query** batches.
- **Trouble Number Query** batches.
- **Carrier Express Activate**, **Carrier Express Change**, and **Carrier Express Disconnect** batches.

Create Number List from Batch

The  icon may appear for any activity log batch entry. This icon indicates that a Number List may be created for that batch entry. Creating a Number List from this icon behaves the same as all other Number List creation functions. See [Number List Popup](#) for more information.

SMS/800 and Carrier Express Messages

For requests that involve messages to and/or from SMS/800 or Carrier Express, a dot will appear next to the activity log entry. A **green** dot indicates that an activity was successfully completed. A **red** dot indicates that an activity was NOT successfully completed. A clear dot indicates that an activity has not completed, therefore no status is available.

These dots also provide a means to view the actual SMS/800 TFNR messages sent and/or received. If the request was a large batch operation with many messages involved, retrieving the data may take a very long time. The ability to view SMS/800 messages is an 8MS permission, and may not be available to all users.

When the **Show All Levels** box is selected, each message in a particular activity is listed separately as shown in the following:

Type	Status	Number	Date	User Id	Abstract
 Copy Record	Complete		03/02/04 09:55P	bso	Batch copy record (12/0).
	Success	800-820-8719	03/02/04 09:55P	bso	New record accepted.
	Success	800-820-8741	03/02/04 09:55P	bso	New record accepted.
	Success	800-820-8743	03/02/04 09:55P	bso	New record accepted.
	Success	800-820-8744	03/02/04 09:55P	bso	New record accepted.
	Success	800-820-8785	03/02/04 09:55P	bso	New record accepted.
	Success	800-820-8808	03/02/04 09:55P	bso	New record accepted.

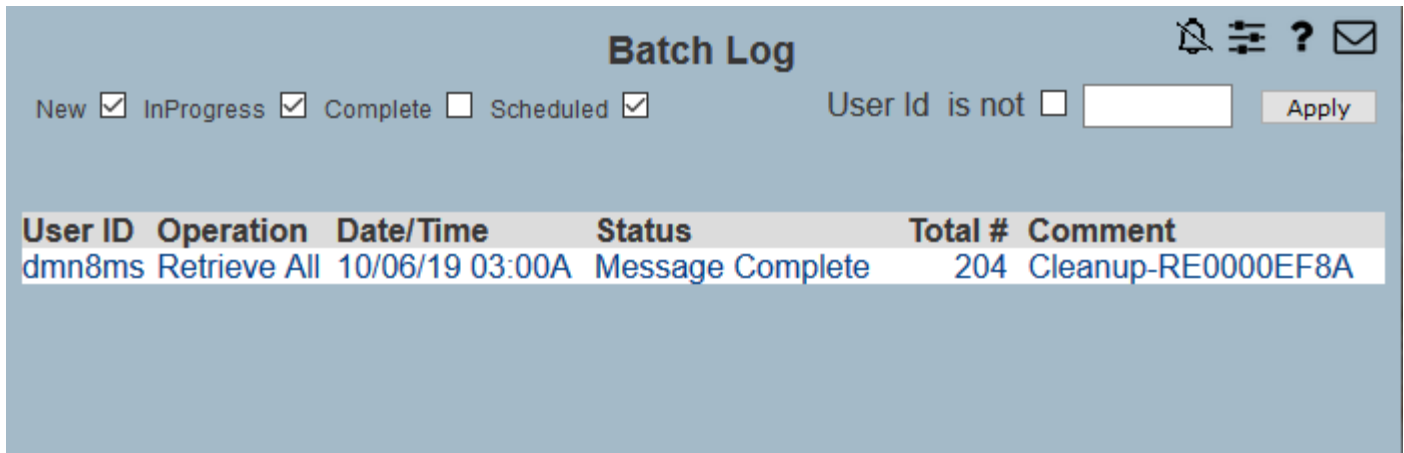
Clicking on any entry will then produce the detail for that message only. In addition, the message "dot" is changed to a line, and will retrieve only the SMS/800 message(s) for that piece of the request.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [Activity Log Preferences](#) for details on customizing this screen.

This function allows you to view the status of current batch operations. For more information on batch operations, see the overview in [Number Administration](#).

To access this screen, select the **Batch Log** link located in the **System Activity** section of the menu. The screen is divided into four main sections. The top two display a list of current batch activities, and provide a series of filters for selecting a subset of batch activities to view:



The screenshot shows the 'Batch Log' interface. At the top, there are filter checkboxes for 'New' (checked), 'InProgress' (checked), 'Complete' (unchecked), and 'Scheduled' (checked). To the right, there is a 'User Id' field with the text 'is not' and an empty input box, followed by an 'Apply' button. Below the filters is a table with the following data:

User ID	Operation	Date/Time	Status	Total #	Comment
dmn8ms	Retrieve All	10/06/19 03:00A	Message Complete	204	Cleanup-RE0000EF8A

When **Batch Log** is selected from the menu, a list of jobs will be displayed. By default, *New*, *InProgress* and *Scheduled* jobs are listed (as shown above). The four checkboxes allow users to restrict what jobs they see. Batches shown may also be limited to jobs initiated by a specific user ID, by entering the desired ID in the **User Id** field.



Access to the **User Id** field and the associated **is not** checkbox are only available if your user id has been granted permission. Access to these fields is generally only granted to administrative personnel.

To refresh the list of jobs shown after changing filtering criteria, hit the **Apply** button.

In the list of activities, each row corresponds to a particular batch operation. The columns are as follows:

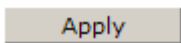
Field	Description
User ID	the person who generated the batch operation.
Operation	the type of the request.
Status	the state of the batch operation. The possible values are: New: the batch job has not run yet Table in Progress: message preparation has begun Table Complete: message preparation is complete Message in Progress: messages are being sent to SMS/800

- **Message Complete:** all messages have been sent
- **Complete:** the batch operation is complete

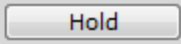
If the status appears as a date/time enclosed in brackets (e.g., **[11/03/02 10:00A]** above), then the batch is scheduled to run at that date/time.

If the status is **Complete**, then the date/time of completion is also shown (as in **Complete [11/02/02 11:41P]** above).

Date/Time	the date/time the batch job was originally submitted. If the batch was scheduled to run at some point in the future, this time stamp will be updated when execution of the batch begins.
Total #	the total number of messages in the batch job. In most cases, this is the count of toll free numbers in the job. However, search and reserve may be sent 10 at a time, thus Total # does not always match the count of numbers.
Comment	an optional user-supplied note.

Select the  button to re-query the database for new batch log entries and/or to update the status of existing operations.

Selecting any column of the Batch Log entry will display more information about the request in the third frame, as shown below:

User ID: gaf	New: 865	
Operation: Query	Queued: 72	
Date/Time: 02/24/11 11:10A	Success: 64	
Status: Message In Progress	Failure: 0	
	Error: 0	
	Total: 1001	
From Number List: New 1k (gaf; 02/22/11 09:57A)		

A count is provided for each status of the messages being sent for the request. If the count for a particular status is equal to or greater than one, it becomes a selectable link to display more detail on that status. This detail is displayed in the lower frame as shown in the following:

Record(s): 1 to 25 of 435		Next 25	Last
Total:			
8002011177	8002017968	8002031200	
8002034915	8002039365	8002079233	
8002090550	8002092588	8002139516	
8002155253	8002155576	8002182213	
8002196936	8002210832	8002211352	
8002211513	8002213212	8002213662	
8002214842	8002216064	8002219346	
8002220908	8002224923	8002227632	
8002230532			
Create Number List			

In most cases, this detail will consist of the toll free numbers contained in the messages for the selected state. The button allows the numbers to be placed into a number list. The number list is specified on a popup window. See [Number List Popup](#) for more information.

As noted above, search and reserve requests may pack multiple numbers into a message. In these cases, this display will contain sequence numbers of messages instead of toll free numbers, and number list creation will not be possible.

Select the button to permanently delete the selected batch log entry. A confirmation window will appear. Note that only new batches or batches on hold may be deleted; running batches may not be deleted. Putting a batch on hold is described below.

Selecting a batch job for which the batch had a **Max Msgs per Hour** set will result in the following in the third frame:

User ID: gaf	New: 990
Operation: Retrieve All	Queued: 0
Date/Time: 02/22/11 09:58A	Success: 10
Status: Message In Progress	Failure: 0
Max Msgs per Hour: 100	Error: 0
	Total: 1000
From Number List: New 1k (gaf; 02/22/11 09:57A)	
Hold	

The **Max Msgs per Hour** field allows you to limit the number of messages per hour being sent to SMS/800. This is intended to help avoid exceeding the per Resp Org CPU percent allocation defined by SMS/800. If this field is shown in the third frame, a user has explicitly set the value when they created the batch.

It is possible to put a batch operation "on hold" by selecting the button. While a batch operation is on hold, no messages will be sent on its behalf. This allows, for example, a job to be suspended so that other, higher priority jobs can be sent. A batch job on hold will appear as follows:

Batch Log ? ☒

New ☒ InProgress ☒ Complete ☐ Scheduled ☒ User Id is not ☐ Apply

User ID	Operation	Date/Time	Status	Total #	Comment
gaf	Retrieve All	02/03/09 10:38A	Table Complete	500	
gaf	Query	02/03/09 10:38A	Message In Progress (Held)	1031	
dmn8ms	Retrieve All	08/01/07 03:11A	Message Complete	2	Cleanup Numlist
dmn8ms	Retrieve All	07/30/07 03:11A	Message Complete	1	Cleanup Numlist
gaf	Reserve	07/26/07 08:44A	Message Complete	1	

Selecting a batch job on hold will result in the following in the third frame:

User ID: gaf	New: 990	
Operation: Retrieve All	Queued: 0	
Date/Time: 02/22/11 09:58A	Success: 10	Delete
Status: Message In Progress (Held)	Failure: 0	Release
Max Msgs per Hour: 100	Error: 0	
	Total: 1000	
From Number List: New 1k (gaf; 02/22/11 09:57A)		

Select the **Release** button to take the batch operation off hold. Once released, messages will again be sent for that job.

Selecting a scheduled batch job will result in the following in the third frame:

User ID: gaf	New: 0	
Operation: Query	Queued: 0	
Date/Time: 02/22/11 10:05A	Success: 0	Run Now
Status: [02/25/11 08:00A]	Failure: 0	Hold
	Error: 0	
	Total: 0	
From Number List: New 1k (gaf; 02/22/11 09:57A)		

Selecting the **Run Now** button will remove the scheduled date/time, and the batch job will begin running.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **Batch Log Preferences** for details on customizing this screen.

This function allows you to set the default value of certain parameters at a company level. Any parameters changed in this function apply to the company you are currently logged in as. To access this screen, select the **Company Prefs** link located in the **System Activity** section of the menu. The following will appear:

Company Preferences

Company

Preference 91 preferences

Value

Description

Source

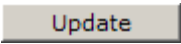
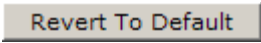
Select the parameter you would like to modify using the **Preference** drop-down list. When a Preference is selected, the fields below will populate.

Field	Description
Company	Displays preferences for a particular Company. Access to this field is determined by your User Type and Company settings; few users will have access to this field.
Value	Displays the current value at the company level. The preference value is changed using this field.
Description	A read-only field which provides an explanation of the preference and/or what aspect of 8MS the parameter controls.
Source	InterLATA carrier, sent in the SMS/800 iec field. A read-only field which indicates how the current value is derived. Possible values are: • Using System Default: the current parameter value has not been

modified.

- **Overriding System Default:** the current preference value has been modified such that it now overrides the system default value.
- **Same As System Default:** the current preference value has been modified, but is the same as the system default.

There are two ways to change the value of a preference:

- Enter a new value in the **Value** field. Select the  button. The **Source** field will change to reflect that the system default is being overridden.
- To set the preference back to the system default value, select the  button. The **Source** field will change to reflect that the system default is again being used.

When trouble-shooting call routing for toll-free numbers that use NPA-NXX routing, it can be difficult to determine the carrier to which a call routes. This is partially because of the number of NPA-NXXs specified on branches in a CPR and partially because it is difficult to know what an OTHER branch might expand to.

The **NPA-NXX Carrier Map Report** function provides the ability to select a toll-free number, 8MS Routing Set or SMS Template and generate a report of NPA-NXXs and the carriers to which they route, based upon the CPR associated with the specified toll-free number, 8MS Routing Set or SMS Template.

In the menu frame, select the **NPA-NXX Carrier Map** link located in the **System Activity** section of the menu. The following will appear in the workspace frame:

The screenshot shows a web-based interface titled "NPANXX Carrier Map". It features a light blue background with a white border. Inside, there are five input fields arranged vertically: "SMS Template" (with a green checkmark icon), "8MS Routing Set" (with a blue checkmark icon), "Toll Free Number" (with a green arrow icon), "Date/Time" (with a dropdown arrow), and "Complex Record" (with a dropdown arrow). Below these fields are two buttons: "Generate" and "Reset". In the top right corner of the window, there are three small icons: a wrench and screwdriver, a question mark, and an envelope.

Report Generation

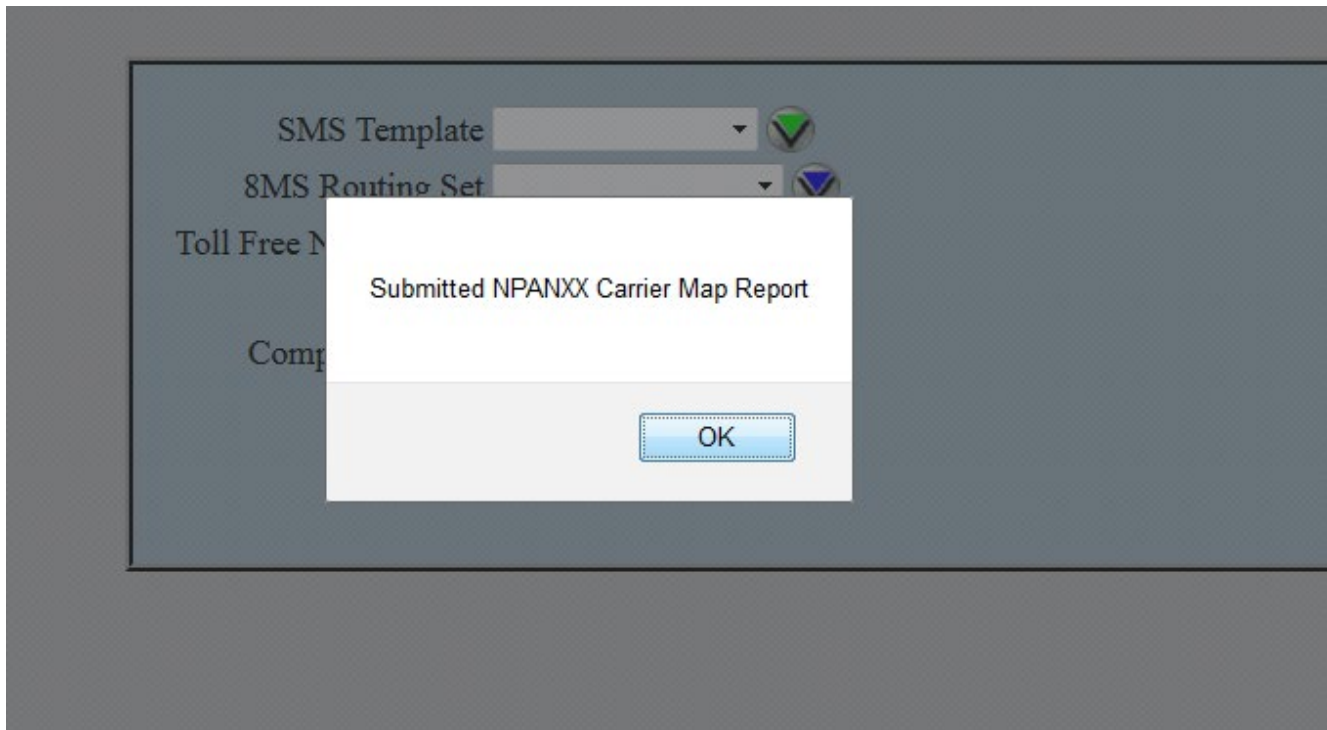
To generate a report, select one of **SMS Template**, **8MS Routing Set** or **Toll Free Number**. If you selected an **SMS Template** or a **Toll Free Number** the **Date/Time** field will populate with all records associated with the selected item. By default, the *Active* record will be selected and the **Complex Record** associated with this record will also be selected.



It is possible to select any available **Date/Time** record. However, since this report is intended to aid in trouble-shooting a production problem, it is unlikely that generating a report for any record other than the *Active* record will be of value.

In the same way, it is possible to select any **Complex Record** but selecting any other than the *Active* one (the record whose name is the date/time of the **Date/Time** selected) is unlikely to be of value.

Once you have selected the desired record, select the **Generate** button. This will start the report request and the following message will be shown.



Generation of an NPA-NXX Carrier Map report may take a few minutes, depending on the complexity of the Complex Record (CPR) being processed.

Report Format

The name of the file will contain the date and time the report was generated. The top of the file will contain a header of information about this report. The first line will be the report name followed by the date/time the report was generated. The next few lines following the title line will be information about the SMS Template, 8MS Routing Set or toll-free number, record date/time and CPR chosen. Below is an example of a report header generated for a toll-free number.

```
NPANXX Carrier Map Report - 06/07/16 08:26A
SMS Template:
8MS Routing Set:
Toll Free Number: 844-568-0170
Date/Time: 03/07/16 11:00A Active
Complex Record: 03/07/16-11:00A
```

Following the header of the file will be one or more lines of data. Each line contains a single path terminating at a Telephone or Announcement node. The data portion of the file will contain all NPA-NXX/Carrier combinations, expanding OTHER as appropriate based on the non-OTHER branches, plus all NPA-NXX/Announcement pairs. The format of the report is a comma-separated values (CSV) file; each line will contain either two or three columns.

- Column 1 contains the six-digit NPA-NXX, for example, 732302.
- Column 2 contains either the carrier CIC code or an announcement code if the final node in a path is an Announcement. If the value is a carrier, it will contain the three-alpha ACNA value followed by the four-digit CIC code, for example, *ALN0444*. If the value is an announcement it will contain either *VCA* or *OBA*.

- Column 3 contains the OTC100 information if applicable. In this case column 2 will be *OTC0110*.

In the event of an error, processing stops and a brief explanation of the error is written to the report. No routing data is generated in the report. Errors occur for node types that make it difficult or impossible to determine the exact carrier to which a call terminates.



The follow nodes will cause report generation to fail:
Allocator, Date, Day, Ten Digit and Time.

Viewing a Report

To view the report, go to the **Activity Log** screen. View your recent activity and you will see something like the following.

Records per Page 20 Set Revert Hide Filters						
Record(s): 1 to 6 of 6						
Type	Status	Number	SMS Template	Date	User Id	Abstract
● Report	Success			06/07/16 08:26A	gaf	NPANXX Carrier Map Report Completed
● SMS Template Change	Success		*AR-STANDARD	06/07/16 08:23A	gaf	Copy SMS template.
● SMS Template Change	Failure		*AR-STANDARD	06/07/16 08:22A	gaf	Copy SMS template.
● SMS Template Change	Success		*AR-STANDARD	06/07/16 08:13A	gaf	Copy SMS template.
● SMS Template Change	Success		*AR-STANDARD	06/07/16 08:13A	gaf	Copy SMS template.
● SMS Template Change	Failure		*AR-GAF-01	06/07/16 08:13A	gaf	Copy SMS template.

To identify the activity entry containing the report, look for a **Type** of *Report* and an **Abstract** of *NPANXX Carrier Map Report Completed*. Select this item and the detail will appear in the bottom frame. You will see something like the following.

Type: Report	Version: 12.1.70 (Gerry's Development Environment)
Status: Success	User ID: gaf / csf Corporation
Date/Time: 06/07/16 08:26A	IP Addr: 192.80.23.28
Abstract: NPANXX Carrier Map Report Completed	
NPANXX Carrier Map	
Count: 156,353	
File Size: 1.79MB	
Download	

At the bottom of this detail you will see the **Count** of lines in the file, the **File Size** and a button labeled **Download**. Clicking on this button will cause the browser to open the report. As stated above, the generated report is in CSV format, allowing the report to be uploaded to any spreadsheet application, or any other application that supports CSV files. How the report is opened is dependent on how your browser is configured. In most cases the browser will offer to open the report in a spreadsheet application.



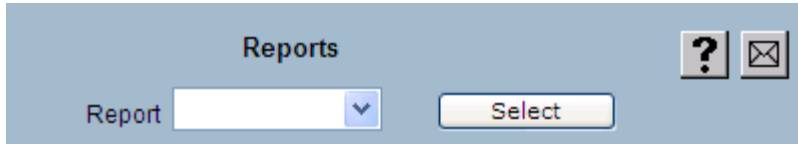
The number of lines in the file is based on the number of NPA-NXX combinations currently available. This will be in the range of 180,000 lines. The application you use to view this file must be capable of supporting files of at least this size.

The report will be available from the **Activity Log** for a few days and will then be removed. If you think you will need this report for future reference, it is suggested that you save the file locally.



This report is based upon the current set of valid NPA-NXXs available in the telephony network. In the event that an **NPA Overlay/Split** occurs, this report should be considered out-of-date and should be generated again from this screen.

This function allows you to generate several types of reports about companies, users, system activities, parameters and preferences. To access this screen, select the **Reports** link located in the **System Activity** section of the menu. The following will appear in the top frame of the screen:



The screenshot shows a blue header bar with the word 'Reports' in the center. On the right side of the header are two icons: a question mark and a mail icon. Below the header, on the left, is the label 'Report' followed by a white dropdown menu with a blue arrow pointing down. To the right of the dropdown is a button labeled 'Select'.

Select the report you would like to run from the **Report** drop-down list. The following are the available reports:

Report	Description
API Types	Lists the defined api types. For each type, the list of allowed api calls is displayed. Each user has an API Type associated with that user.
Company	Provides company information sorted by name.
Daily Activity	Displays Number and Customer Record activity counts by user. Selection criteria can be used to restrict the output by date range and user login.
Params	Provides information on system parameters. Selection criteria allow the output to be restricted to parameters of a given type. The sort order of the output is also selectable.
Preference	Provides information on company/user preferences. Selection criteria allow the output to be restricted to preferences for a particular company, preferences for a particular user, or preferences with a given key. The sort order of the output is also selectable.
User Types	Lists the defined user types. For each type, the list of allowed functions is displayed. Each user has a User Type associated with that user.
Users	Reports information about users. Optional filters are the Company Name and/or the User Type.

SMS/800 provides a list of Resp Org **Primary** and **Change** contacts to allow one Resp Org owner to contact another. This contact list is normally only viewable at the SMS/800 web site (not the SMS/800 user interface). 8MS stores a snapshot of this contact data to allow easy access to the data from within 8MS. This snapshot is updated on a regularly scheduled basis. The **SMS/800 Contacts** function provides user access to this contact information.



The data displayed on this screen is controlled by SMS/800, not 8MS. All change requests related to this data should be made to SMS/800.

In the menu frame, select the **SMS/800 Contacts** link located in the **System Activity** section of the menu. The screen is divided into three frames. The top frame allows you to specify the search criteria for the contacts you want. This section appears as follows:

The **Last Updated** field indicates the last time this data was updated from SMS/800.

The following is a description of the search criteria:

Field	Description
Name	allows you to search by the contact's first and last name. Names do not have to be fully specified; a partial spelling of the name may be entered. Any names matching the partial name entered will be returned.
Company	allows you to search by the contact's company name. The company name does not have to be fully specified; a partial spelling of the company may be entered. Any companies matching the partial company name entered will be returned.
RespOrg	allows you to search by the contact's Resp Org. The RespOrg field does not have to be fully specified; a partial spelling of the RespOrg may be entered. Any RespOrgs matching the partial RespOrg will be returned.
Contact Type	This drop-down allows you to filter the list for Primary , Change or All contacts.

Once the search criteria have been specified, the search is initiated by selecting the **Apply** button. The results appear in the middle frame as shown below.

Name	Company	RespOrg	Type	
Change Contact	csf Corporation	ART01	Change	See NOTES *** ROC Participant
Change Contact	csf Corporation	ART19	Change	ROC Participant
Matt Noreen	csf Corporation	ART02	Change	ROC Participant
Matt Noreen	csf Corporation	ART03	Change	ROC Participant
Matt Noreen	csf Corporation	ART04	Change	ROC Participant

When records are displayed, the **Sort By** drop-down is used to control the order of the results. By default, results are ordered by **Name**. They may also be ordered by **Company** or **Resp Org**.

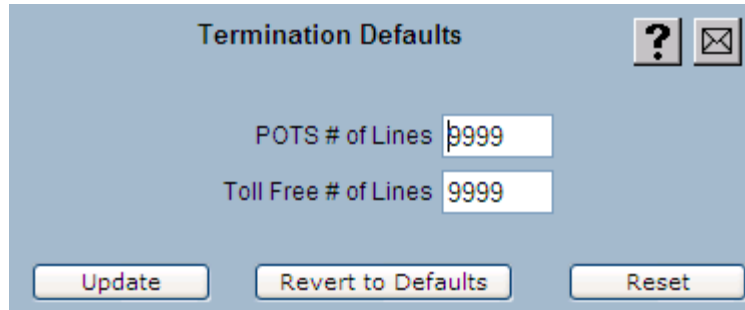
Selecting any item in a row will display the detail for that contact. A detail record appears in the bottom frame as shown below.

Name: Change Contact	Company: csf Corporation
Address: csf Corporation 285 Davidson Avenue Somerset, New Jersey 08873	
Phone #: 732-356-6999	Trouble #: 732-356-6999
Fax #: 732-302-0799	Email Address: smschange@csfcorp.com
Resp Org: ART01	Contact Type: Change
ROC Participant: Yes	
Notes: Entity AR*** participates in the ROC process and would prefer to receive port request via the ROC system. The 8MS system (www.8msweb.com) supports ROC and provides a mechanism to integrate ROC into your normal provisioning process.	

The **Reset** button puts the search screen back to it's original state, as if you had just selected the **SMS/800 Contacts** link. The results section will not be cleared so that you may still view your last search results.

8MS provides a default number of lines for all terminations used in the CAD and CPR of a toll free number. This value can be overridden per termination for a specific toll free number in **Record Management**.

The **Termination Defaults** screen allows you to override the 8MS default value for all terminations. To access this screen, select the **Termination Defaults** link located in the **System Activity** section of the menu. The following will appear in the top frame of the screen:



Termination Defaults

POTS # of Lines 9999

Toll Free # of Lines 9999

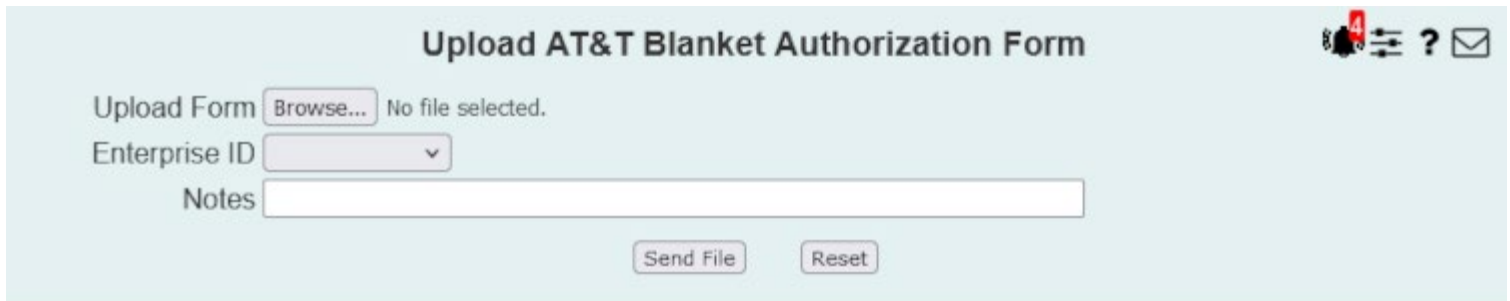
Update Revert to Defaults Reset

The initial default value used is what SMS/800 uses as it's default: 9999. When this screen is brought up for the first time, both the **Pots # of Lines** and **Toll Free # of Lines** text fields will be set to the 8MS default. To change either of these defaults to another value, type the new value in the appropriate text field and select the **Update** button. To revert back to the original 8MS value, select the **Revert to Defaults** button.

For details on setting the number of lines for a specific toll free or POTS number see [Termination Lines](#) which is part of the [Record Management](#) link located in the **Number Administration** section of the menu.

This screen allows you to upload an AT&T *Blanket Authorization* form, which will be sent to AT&T for approval.

To access this screen, select the **Upload AT&T Auth Form** link located in the **System Activity** section of the menu. The following will appear in the workspace.



Upload AT&T Blanket Authorization Form

Upload Form No file selected.

Enterprise ID

Notes

To upload a form

1. Click the **Browse** button to choose the file to be uploaded.
2. Select the **Enterprise ID** associated with this authorization request.
3. Enter any appropriate notes in the **Notes** field.

When done, select the **Send File** button. The form will be uploaded to the 8MS server and will then be forwarded on to AT&T.



Note that the file is renamed prior to sending it to AT&T. Both the original and new file names are shown in the Activity Log.

The **Usage Counts** screen displays the number of transactions a company has performed and the current and maximum number count for that company. 8MS can also be customized, per user, to alert you at login if you are approaching or have exceeded your transaction and number limits. See [Limits Alert](#), below, for details on customizing your alert notification.

To access this screen, select the **Usage Counts** link located in the **System Activity** section of the menu. The following will appear in the top frame of the screen:

A usage count report may be grouped by **Day**, **Month** or **Year**. Enter a **Start Date** and, optionally, an **End Date**. If no **End Date** is provided then today's date is used.

A usage count report may also be restricted to a single user of your company. This is done by entering an 8MS login in the **User** field.

Note that if you are a privileged company the **Usage Counts** screen will also show a **Company** drop-down list; selecting a company on that drop-down will restrict the report to that single company. Non-privileged companies will not see the drop-down list on the screen; all reports will be restricted to your company.

Select the **Show Counts** button to generate the report. The middle frame will be populated with a report that shows the maximum amount of toll free numbers on 8MS, a summary of local deletes, API calls, GUI transactions and the number of test calls run. Below is a sample of a monthly report.

Date	Company Name	Maximum	All	Transactions		Carrier Express			TeXT
		Numbers	Numbers	Local	Delete	API	GUI	Activate Disconnect	
2006/09	MJL Enterprises	1,068	1,743	9	5,149	6,979	0	0	0
2006/10	MJL Enterprises	920	981	45	8,181	12,258	0	0	0
2006/11	MJL Enterprises	586	586	0	2,842	6,941	0	0	0
2006/12	MJL Enterprises	625	625	0	0	1,815	0	0	0
2007/01	MJL Enterprises	650	657	665	657	3,210	0	0	0

The **Maximum Numbers** field is the maximum amount of numbers that has been on the 8MS platform for the day/month/year (i.e. the **Group By** value). The **All Numbers** field shows the total count of unique numbers that have ever been on the platform during the day/month/year. This takes into account **Delete Local** and **Change Respong** actions that have occurred. Thus, the **All Numbers** value may exceed the **Maximum Numbers** value without exceeding the company's Service Level.

Any counts that exceed company limits are shown in red as shown in the example below.

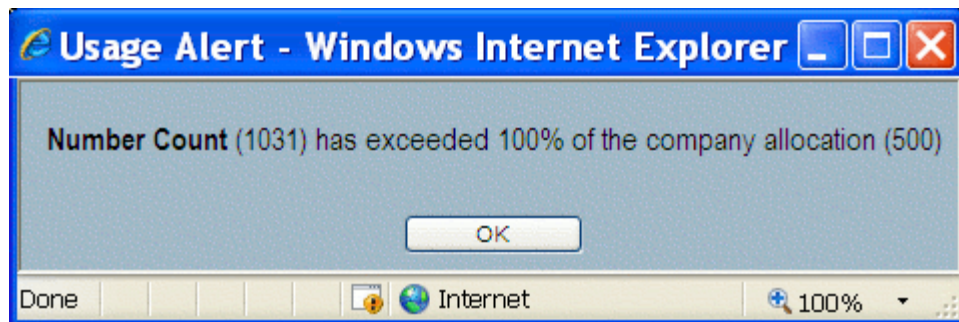
2007/04 MJL Enterprises	586	56	12	1	5557

Selecting one of the hyperlinks in any of the columns of a summary report will show more detail on the selected count. Below is a sample of a detail report.

GUI Transaction Details - Company maximum is 55555 transactions.			
Date/Time	Request	User	Count
09/15/06 01:06P	Record Change	mjlent	3
09/15/06 01:40P	Batch Change Resporg	mjlent	1
09/15/06 01:40P	Batch Change Resporg	mjlent	1

Limits Alert

While being able to view the detail of your usage is useful, it does require you to explicitly go to the **Usage Counts** screen to check your counts. To keep you aware of current transaction and number counts, 8MS can be configured to alert you if your counts have exceeded a tunable value. The alert will appear at login or when a menu item is selected from the menu frame. If your allocation limits have been exceeded, the following popup will appear.



This alert is controlled by a **User Preference** called **UsageAlertPercent**. This preference takes two values separated by a colon. The first value is a minimum alert value. This value is the percent of your allocation limit at which the alert popup will appear. The second value is an increment value. This says how often to show the alert. Consider the following example.

If your **UsageAlertPercent** is set to **70:10** then you will be alerted when any of your current counts hit 70% or greater. The alert will not be shown again until it has exceeded 10% more, or 80%. Thus, the **70:10** value will cause an alert to appear when your current counts hit or exceed 70%, 80%, 90% and 100%. Setting your preference to **60:5** will cause an alert to appear when your current counts hit or exceed 60%, 65%, 70%, 75%, 80%, 85%, 90%, 95%, and 100%.

Setting your increment value to 0 will cause an alert to be shown when your current counts first hit or exceed your minimum alert value and when your current counts exceed your allocation limit. By default, the **UsageAlertPercent** preference is not set, so no alerts will be shown until you set this preference. Refer to **Customizing 8MS** for how to set **User Preferences** and see **UsageAlertPercent** under **User Interface Preferences** for details on customizing this value.

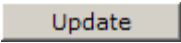
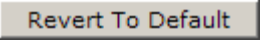
This function allows you to set the default value of certain parameters at a user level. Any parameters changed in this function apply to the user that you are currently logged in as. To access this screen, select the **User Prefs** link located in the **System Activity** section of the menu. The following will appear:

Select the preference you would like to modify from the **Preference** drop-down list. When a preference is selected, the fields below will populate.

Field	Description
User	Displays preferences for a particular user. Access to this field is determined by your User Type ; few users will have access to this field.
Value	Displays the current value at the user level.
Description	A read-only field which provides an explanation of the preference and/or what aspect of 8MS it controls.
Source	A read-only field which indicates how the current value is derived. Possible values are: • Using System Default: the current preference value has not been modified, nor is there a company value overriding the system default. • Using Company Default: the current preference is using the company default value.

- **Overriding Company Default:** the current value has been modified to override the company default value.
- **Same As Company Default:** the current preference value has been modified, but is the same as the company default.
- **Overriding System Default:** the current preference value has been modified to override the system default value.
- **Same As System Default:** the current value has been modified, but is the same as the system default.

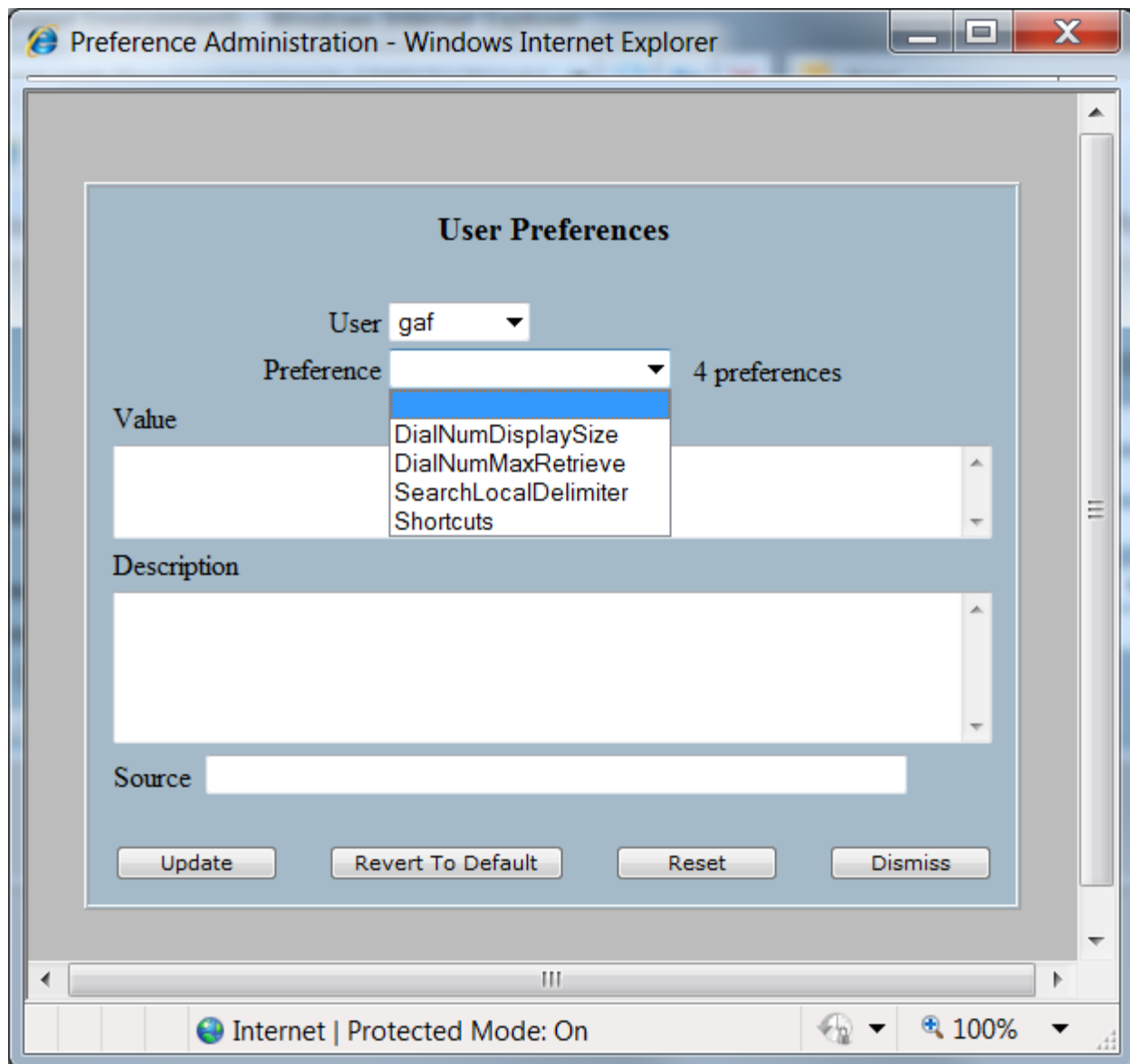
There are two ways to change the value of a preference:

- Enter a new value in the **Value** field. Select the  button. The **Source** field will change to reflect that the system or company default is being overridden.
- To set the preference back to the system default value, select the  button. The **Source** field will change to reflect that the system or company default is again being used.

Selecting the  button will clear all fields on the screen.

Per-Screen User Preferences

A second version of the **User Preferences** screen, known as the **Per-Screen User Preferences** screen, is available from the **Toolbar**, located on the upper-right of every screen. On the **Per-Screen User Preferences**, the **Preference** drop-down list will only contain those preferences that affect this screen. Below is an example of **Per-Screen User Preferences**.



There are several differences between the normal **User Preferences** screen and the **Per-Screen User Preferences**. The Per-Screen version appears as a popup rather than as a normal screen. Since it is a popup, it has a **Dismiss** button; selecting this button dismisses the popup. Finally, note that in this example, there are only 4 preferences in the **Preference** drop-down list. There are normally more than 70 User Preferences available in the system, but since this instance of the popup is for the **Search Local Numbers** screen, the drop-down list only contains those preferences that affect this screen.

See [Toolbar](#) for more information on the toolbar.

The **Welcome Page** is the screen shown when a user first logs in to 8MS. It may also be accessed at any time by selecting the **Welcome Page** link located in the **System Activity** section of the menu.

The **Welcome Page** is intended to provide information about the 8MS instance you have logged in to. It provides a welcome message which includes what version of 8MS is running on this platform, a link to the release notes for this version, an authorization notice, the help-desk number, and what browsers and versions are officially supported. A logo is normally shown at the top of the page. This logo is customizable and may show your company logo. If this has not been configured the CSF Corporation logo will be shown. A typical **Welcome Page** is shown below.



Customization

The **Welcome Page** is almost entirely customizable. **Private** and **Dedicated** Platforms may customize what is shown here. Refer to **Customizing 8MS** for how to set **Company Preferences** and see **WelcomeMsg** under **Login Preferences** for details on customizing your welcome message.

Somos Downtime

Somos downtimes are normally shared with users about two weeks before the downtime. The **Welcome Page**

will show the date/time range of the Somos downtime when we receive the message. This message is shown near the top of the page, just below any company or platform icon, as shown below.



DOWNTIME Somos Production will be down on Sunday, June 18, 2023, from 01:00 AM to 09:00 AM CT.

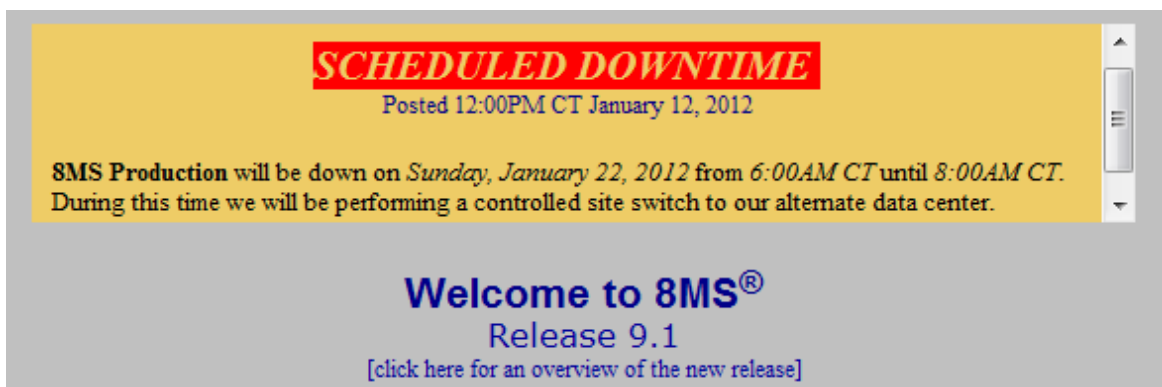
Welcome to 8MS®
Release 24.0

In addition to showing the message on the **Welcome Page**, the text *DOWNTIME* is shown at the top of the menu, just below the company name and userid, as shown below. Clicking on the *DOWNTIME* text will display the **Welcome Page**.



Login Announcement

In the event that 8MS Support needs to alert users of a problem or scheduled downtime, a message may be displayed between the company logo and the welcome message. Messages such as these will typically be shown anywhere from a day to a week or two, but not normally more than that.



This section of the document describes all Company and User Preferences. These preferences are values that affect the appearance and behavior of the 8MS User Interface. Preferences cover three general areas: look and behavior of individual screens, common features across all screens, and system performance. Preferences may be one of three types:

- **Company Preferences** are those preferences that affect all users within a company. These preferences are set via the **Company Prefs** screen.
- **User Preferences** are those preferences that affect a single user within a company. These preferences are set via the **User Prefs** screen.
- **User/Company Preferences** are those preferences that can be set for all users within a company but may then be overridden by each individual user. The company preference is set via the **Company Prefs** screen while the user preference is set via the **User Prefs** screen.

Note that most User and Company preferences have a system-wide default value. If you have not specified a value for any of these preferences, they will contain the system-wide default value.

Also note that in the descriptions below, the preferences do not list their type (i.e., User, Company, or User/Company). This is because each 8MS platform may define each preference as a different type. The **User Prefs** and **Company Prefs** screens provide a drop-down list of available preferences. This will determine the type of each preference. If you are unsure about a particular preference, please contact the 8MS Support Team.

Finally, it should be noted that the **Company Preference** screen is not available for companies on a Service Bureau platform since it is possible for one company to negatively impact system performance for other companies. If you are on a Service Bureau platform, contact the 8MS Support Team and they will make any desired configuration changes.

The following individual screens may be customized:

Activity Log	Search Local Numbers
API Msg Status	Search Local Records
Batch Log	Search Local SMS Templates
Record Management	Search/Reserve
Carrier Express Message Status	SMS Message Status
CPR Management	Spare # Forecast
Disconnect	8MS Routing Set Info
Login	SMS Template CPR Management
Retrieve	SMS Template Info
ROC Management	SMS Template Management
ROC Submit Request	Toll Free Number/8MS Routing Set Report
Search Local Carrier Express	

EditPlan, the Complex Routing Editor, has its own preferences screen. Refer to **EditPlan Preferences** for the details on this screen.

Some preferences affect behavior across all screens. Additionally, the 8MS menu has a *Favorites* feature that allows you to toggle your menu view between all available menu items and your favorite items. The following common features may be customized.

Sending Messages

8MS Menu Favorites

User Interface

The following system processes are customizable via company preferences. Customizing these processes may affect system performance.

Auto Reserve

Batch Performance

CPRGen Management

Number List Management

LCRGen Management

The following set of preferences affect individual screens in the user interface.

Activity Log

These preferences influence the behavior of the **Activity Log** screen.

ActivityRetention

is the number of days to save Activity Log entries.

ActLogMaxRetrieve

is the maximum number of records the Activity Log will retrieve before suggesting a more restrictive filter.

ActlogDelimiter

is the delimiter for the "spreadsheet-friendly" Activity Log detail.

ActLogDisplaySize

is the number of records to display in one load to the screen.

API Msg Status

These preferences influence the behavior of the **API Message Status** screen.

ApiMsgLimit

is the default message limit for API Msg Status.

Batch Log

These preferences influence the behavior of the **Batch Log** screen.

BatchLogDisplaySize

is the maximum number of Batch entries to display on the batch log screen.

BatchLogMaxRetrieve

is the maximum amount of numbers to display in the bottom portion of the batch log screen.

RequeueBatch

indicates whether or not to show the Requeue button on the Batch Log screen. If set to '1', the button will appear.

Record Management

These preferences influence the behavior of the **Record Management** screen.

Note that **ContactName** and **ContactPhone** also affect the **Search/Reserve** screen. **BillToNumber**, **ListName1**, **RAO** and **SFNumber** also affect the **CPRGen Management**. Finally, the **SMS Template Management** screen is affected by the following fields: **BillToNumber**, **ContactName**, **ContactPhone**, **DefaultTerminationsTF**, **InterLATACarrier**, **IntraLATACarrier**, **RAO**, **SFNumber**, and **SmsTemplatesCprColors**.

BillToNumber

is the default value for the BillToNumber field in the Number Information section of Record Administration. This is also the default value used for Cprgen batch activations of Reserved or Transitional numbers.

CadDefaultTab

is the default tab that is selected when accessing the Record Management screen. See **Tab Management** for the list of valid values.

CadTabs

is a comma separated list of tabs to show on the Record Management screen. The order the values are entered here indicates the order the tabs will appear on the screen. See **Tab Management** for the list of valid values.

ContactName

is the default value for the Contact Name field in the Number Information section of Record Administration.

ContactPhone

is the default value for the Contact Phone field in the Number Information section of Record Administration.

DAType

is the default value for the Directory Assistance Type. The value can be one of "N" (normal), "G" (government), or "F" (frequently called).

DefaultTerminationsPOTS

is the default POTS CNT9 values. Optional values are *LNS*, *CITY*, *FSO*, *HML*, *LSIS*, *LSO*, *SFG*, *STN*, *UTS*.

DefaultTerminationsTF

is the default toll-free number CNT9 values. Optional values are *LNS*, *CITY*, *FSO*, *HML*, *LSIS*, *LSO*, *SFG*, *STN*, *UTS*.

InterLATACarrier

is the default value (CIC code) for the InterLATA Carrier field in the Number Information section of Record Administration.

IntraLATACarrier

is the default value (CIC code) for the IntraLATA Carrier field in the Number Information section of Record Administration.

ListingType

is the default value for Listing Type in Record Administration. It can be one of "BL" (blocked), "LI" (published), or "NP" (non-published).

ListName1

is the default value for the Names field in the Listing section of Record Administration. This preference is also the default value used for Cprgen batch activations of Reserved or Transitional numbers.

RAO

is the default value for the RAO field in the Number Information section of Record Administration. This is also the default value used for Cprgen batch activations of Reserved or Transitional numbers.

ScpRecStatusValidStatusList

defines a comma separated list of schedule record status values for which available SCP status data will be shown. Records not in one of these status values will not have SCP status data shown even it is available. If the list is empty, no SCP status data will ever be shown. The values for this preference are the numeric equivalents of the record status values, as shown below.

SENDING: 3

ACTIVE: 4

OLD: 5

DISCONNECT: 7

SFNumber

is the default value for the SFNumber field in the Number Information section of Record Administration. This is also the default value used for Cprgen batch activations of Reserved or Transitional numbers.

SmsTemplatesCprColors

contains the colors used in the Complex Record drop-down list to distinguish DN CPRs from Template CPRs. The format is *fg-color:bg-color* where *fg-color* is the foreground (text) color and *bg-color* is the background (box surrounding the text) color. See [User Interface Colors](#) in the [Terminology](#) section for an explanation of how colors may be specified.

CPR Management

These preferences influence the behavior of the [CPR Management](#) screen as well as [SMS Template CPR Management](#) and [editplan](#), the [Complex Routing Editor](#).

CprMaxRetrieve

is the maximum number of CPR records that can be returned by the **Get Plan** button of CPR Management.

PlanEditorGraphicalMode

controls the way the plan editor presents data. When set to 0, the editor always display nodes as boxes with text. When set to 1, the editor uses an image to represent the type of each node.

PlanRetention

is the number of days to retain local plans created by the plan editor through Save_As.

Disconnect

These preferences influence the behavior of the **Disconnect** screen.

DisconnectDefaultTab

is the default tab that is selected when accessing the Disconnect screen. See **Tab Management** for the list of valid values.

DisconnectTabs

is a comma separated list of tabs to show on the Disconnect screen. The order the values are entered here indicates the order the tabs will appear on the screen. See **Tab Management** for the list of valid values.

EndInterceptDays

Number of days to add to the current date for the **End Intercept Date** field.

Login

These preferences influence the behavior of the **Login** screen.

WelcomeMsg

is the banner message that appears after logging in to 8MS. It can contain html.

Retrieve

These preferences influence the behavior of the **Retrieve** screen.

NumberDataOnly

is the default for the Number Data Only checkbox on the Query screen. If set to '1', the checkbox will be checked.

ROC Management

These preferences influence the behavior of the **ROC Management** screen.

RocDefaultCheckout

is the default value selected in the **Check Out State** drop-down. The values for this preference are

the numeric equivalents of the check-out states, as shown below.

Checked Out: 0

Not Checked Out: 1

Both: 2

RocDefaultProgress

is the default value selected in the **Progress** drop-down.

RocDisplaySize

is the number of records to display in one load to the screen.

RocResponseWaitTime

is the time, in seconds, to wait for ROC responses.



Queries sent to the Somos ROC system can be slow because of the volume of data returned per toll-free number, multiplied by the large amount of numbers allowed in a single request. This preference was added in response to that problem. Be cautious of setting this value too low as it may create problems when trying to view requests.

RocStartDaysBefore

is the number of days before today for the Start Date default.

ROC Submit Request

These preferences influence the behavior of the **ROC Submit Request** screen.

RocDefaultRespOrg

is the default Resp Org populated in the **Requesting RespOrg** field.

RocResponseWaitTime

is the time, in seconds, to wait for ROC responses.



Queries sent to the Somos ROC system can be slow because of the volume of data returned per toll-free number, multiplied by the large amount of numbers allowed in a single request. This preference was added in response to that problem. Be cautious of setting this value too low as it may create problems when trying to view requests.

Search Local Numbers

These preferences influence the behavior of the **>Search Local Numbers** screen.

Note that **SearchLocalDelimiter** affects the **Search Local Records**, **Search Local SMS Template** and **Search Local Carrier Express** screens as well.

DialNumDisplaySize

is the number of records to display in one load to the screen.

DialNumMaxRetrieve

is the maximum number of records to retrieve before requiring more restrictive filter.

SearchLocalDelimiter

is the delimiter for the "spreadsheet-friendly" Search detail.

Search Local Records, Search Local SMS Template, and Search Local Carrier Express

These preferences influence the behavior of the **Search Local Records**, **Search Local SMS Template** and **Search Local Carrier Express** screens.

Note that **SearchLocalDelimiter** affects the **Search Local Number** screen as well.

LocalRecDisplaySize

is the number of records to display in one load to the screen.

LocalRecMaxRetrieve

is the maximum number of records to retrieve.

SearchLocalDelimiter

is the delimiter for the "spreadsheet-friendly" Search detail.

Search/Reserve

These preferences influence the behavior of the **Search/Reserve** screen. The Reservation Data section of the Search/Reserve provides a RespOrg drop-down list. The selected item in this drop-down indicates the Resp Org under which the numbers will be reserved. The preferences described here primarily influence the behavior of this drop-down list.

Note that **ContactName** and **ContactPhone** affect the **Record Management** screen as well.

ContactName

is the default value for the Contact Name field when reserving numbers.

ContactPhone

is the default value for the Contact Phone field when reserving numbers.

CreateNumList

indicates whether or not to create a number list for search and reserve requests. Setting this to '1' creates number lists.

ReserveCustNameRequired

Display and require the **Customer Name** field. Set to 1 to display and require the **Customer Name**. Set to 0 to hide the field.

ReserveResporg

This preference overrides the company default Resp Org.

ReserveResporgList

This preference is a comma separated list of Resp Orgs to be displayed in the drop-down. The string **All** is a shorthand for every Resp Org available for this company.

Privileged companies (typically on a Private or Dedicated 8MS platform) may also include Resp Orgs that belong to other companies, allowing that privileged company to have control over all Resp Orgs on that 8MS platform.

ReserveSelectInitialResporg

This preference indicates whether or not to populate the **RespOrg** drop-down list with the User or Company specified default Resp Org selected. Setting this preference to 1 says to select the default Resp Org; setting it to 0 says do not select the default Resp Org. The default Resp Org will be the one indicated in the preference **ReserveResporg**. If this preference is not set the selected Resp Org is the Company default Resp Org.

Search8fa

Allow 800ForAll Searches by adding the 800ForAll search fields. Set to 1 to show the fields and 0 to hide them.

SMS Message Status/Carrier Express Message Status

These preferences influence the behavior of the **SMS Message Status** and **Carrier Express Message Status** screens.

SmsMsgLimit

is the initial number of records (SMS messages) to show on the SMS Message Status screen.

Spare # Forecast

These preferences influence the behavior of the **Spare # Forecast** screen.

ForecastSparesApiRetrieveLimit

is the maximum amount of toll-free numbers that will be retrieved by the API.

ForecastSparesDisplaySize

is the maximum amount of rows to display in a page.

ForecastSparesNumListLimit

is the maximum amount of toll-free numbers that can be inserted into a number list.

ForecastSparesRetrieveLimit

is the maximum amount of toll-free numbers that will be retrieved.

8MS Routing Set Info

These preferences influence the behavior of the **8MS Routing Set Info** screen.

RoutingSetDisplaySize

is the number of records to display per screen on 8MS Routing Set Info.

RoutingSetMaxRetrieve

is the maximum number of records to retrieve on 8MS Routing Set Info.

SMS Template CPR Management

These preferences influence the behavior of the **SMS Template CPR Management** screen as well as **CPR Management** and **editplan**, the **Complex Routing Editor**.

CprMaxRetrieve

is the maximum number of CPR records that can be returned by the **Get Plan** button of CPR Management.

PlanEditorGraphicalMode

controls the way the plan editor presents data. When set to 0, the editor always display nodes as boxes with text. When set to 1, the editor uses an image to represent the type of each node.

PlanRetention

is the number of days to retain local plans created by the plan editor through Save_As.

SMS Template Info

These preferences influence the behavior of the **SMS Template Info** screen.

TemplateDisplaySize

is the number of records to display per screen on SMS Template Info.

TemplateMaxRetrieve

is the maximum number of records to retrieve on SMS Template Info.

SMS Template Management

These preferences influence the behavior of the **SMS Template Management** screen.

Note that **SmsTemplatesCprColors**. also affects the **Record Management** screen.

BillToNumber

is the default value for the BillToNumber field in the Number Information section of Record Administration. This is also the default value used for Cprgen batch activations of Reserved or

Transitional numbers.

ContactName

is the default value for the Contact Name field in the Number Information section of Record Administration.

ContactPhone

is the default value for the Contact Phone field in the Number Information section of Record Administration.

DefaultTerminationsTF

is the default toll-free number CNT9 values. Optional values are *LNS*, *CITY*, *FSO*, *HML*, *LSIS*, *LSO*, *SFG*, *STN*, *UTS*.

InterLATACarrier

is the default value (CIC code) for the InterLATA Carrier field in the Number Information section of Record Administration.

IntraLATACarrier

is the default value (CIC code) for the IntraLATA Carrier field in the Number Information section of Record Administration.

RAO

is the default value for the RAO field in the Number Information section of Record Administration. This is also the default value used for Cprgen batch activations of Reserved or Transitional numbers.

SFNumber

is the default value for the SFNumber field in the Number Information section of Record Administration. This is also the default value used for Cprgen batch activations of Reserved or Transitional numbers.

SmsTemplatesCprColors

contains the colors used in the Complex Record drop-down list to distinguish DN CPRs from Template CPRs. The format is *fg-color:bg-color* where *fg-color* is the foreground (text) color and *bg-color* is the background (box surrounding the text) color. See [User Interface Colors](#) in the [Terminology](#) section for an explanation of how colors may be specified.

TemplateResporg

The default Resp Org to populate in the **Resp Org** field.

Toll Free Number/8MS Routing Set Report

These preferences influence the behavior of the [Toll Free Number/8MS Routing Set Report](#).

CadRptFontSize

overrides the default size of the text font used on the CAD and CPR summary sections of the report.

CprRptFontSize

overrides the default size of the text font used on the CPR section of the report.

ShowReportPopup

indicates whether or not you want to customize the generated report. Setting this preference to 1 causes a pop-up to appear. This pop-up allows you to change font size, orientation and other

formatting options. Set this preference to 0 if you are happy with the default values as this will save having to click the **View** button on the pop-up, allowing the report to be generated more quickly.

The following set of preferences affect common behavior of the user interface.

Sending Messages

These preferences influence behavior when sending messages to SMS/800. Some affect user interface while others affect the 8MS API. Both sets of preferences are common across many or all screens or API calls.

DefaultApiRespTime

is the time, in seconds, to wait for a response from SMS/800 when called from the API.

ResponseWaitTime

is the time, in seconds, to wait for an SMS/800 response.

Tab Management

This section lists the values to be used for **CadTabs**, **DisconnectTabs**, **CadDefaultTab** and **DisconnectDefaultTab** preferences for **Record Management** and **Disconnect**. The **Tab Name** column is the name of the tab that will appear on the screen. The **Value** column is the value to use in the preference.

Tab Name	Value	Screen
SMS/800	sms	Disconnect
SMS CAD	smscad	Record Management
SMS PAD	smspad	Record Management
Verizon 0222	vzeb	All

User Interface

These preferences influence appearance, behavior, and population of lists in the user interface. These preferences are common across 8MS.

EmailSupport

is the destination email address populated in an email composition window when the **Email Customer Support** button is selected. Setting this parameter to the value "no email" indicates the email button should not be shown.

FormBg

is the background color of the form area for each screen. See **User Interface Colors** in the **Terminology** section for an explanation of how colors may be specified.

LightPanel

is the background color of the area behind the form. See **User Interface Colors** in the **Terminology** section for an explanation of how colors may be specified.

MaxMsgsPerHour

is the value populated in the **Max Msgs per Hour** field on the **Batch Pop-up** screen. This preference is intended to be used for batches that may influence the per Resp Org CPU percent allocation defined by SMS/800 and is only applied to the **Batch Pop-up** for the following screens: **Cad Management**, **Copy Record**, **Disconnect**, **Transfer**, and **Undo Record Change**. Any other screen that generates a batch will not populate the **Max Msgs per Hour** field with this value.

MyNumberLists

is a list of Number List Names, delimited by a semi-colon (;). These names will appear at the top of any list of Number Lists, before the most recently used Number Lists.

MyRoutingSets

is a list of 8MS Routing Set Names, delimited by a semi-colon (;). These names will appear at the top of the list of 8MS Routing Sets on all 8MS Routing Set drop-down lists, before the most recently used 8MS Routing Sets.

MySmsTemplates

is a list of SMS Template Names, delimited by a semi-colon (;). These names will appear at the top of the list of SMS Templates on all SMS Template drop-down lists, before the most recently used SMS Templates.

NumListSort

indicates how to sort number lists, wherever they may appear. They may be sorted by Userid (U), Notes (N) or Time (T).

RecentNumberCount

is the number of recently referenced toll-free numbers to display in the recently used toll-free number choice list.

RecentNumberListCount

is the number of recently referenced Number Lists to initially display in the recently used number lists drop down.

RecentPortalClientCount

is the number of recently referenced Portal Clients to initially display in the recently used Portal Clients drop down.

RecentRoutingSetCount

is the number of recently referenced 8MS Routing Sets to display in the recently used 8MS Routing Sets drop-down list.

RecentSmsTemplateCount

is the number of recently referenced SMS Templates to display in the recently used SMS Templates drop-down list.

ResponseWinEnabled

indicates whether or not to show the response frame which is shown on the bottom of all screens that send messages to SMS. Setting this to 1 shows the response frame; setting it to 0 hides the response frame.

ResponseWinSize

is the default size (in percent) of the response frame that is shown on the bottom of all screens that send messages to SMS.

RowHighlightColors

contains the colors for highlighting the current row in a table. The format is *fg-color:bg-color* where *fg-color* is the foreground (text) color and *bg-color* is the background (box surrounding the text) color. If a single color is specified, it is treated as the background color. See [User Interface Colors](#)

in the **Terminology** section for an explanation of how colors may be specified. Set the value to *'disable'* to turn off highlighting.

RowStripeColors

contains the colors for odd/even rows in a table. The format is *odd-fg-color:odd-bg-color,even-fg-color:even-bg-color* where *odd-fg-color* is the foreground (text) color and *odd-bg-color* is the background (box surrounding the text) color of odd rows and *even-fg-color* is the foreground (font) color and *even-bg-color* is the background (box surrounding the text) color of even rows. If only 2 comma-separated colors are specified, they are treated as background colors. See **User Interface Colors** in the **Terminology** section for an explanation of how colors may be specified. Set the value to *'disable'* to turn off highlighting.

Shortcuts

Shortcuts are hyperlinks that allow you to execute a particular action on another screen without having to go to the screen that contains that action. See **Shortcuts** for details. If the preference is set to 1 then show shortcut menus on data items that contain shortcuts. If the preference is set to 0 then don't show shortcut menus.

ShortcutsColors

contains the colors for indicating an item has a shortcuts menu. The format is *fg-color:bg-color* where *fg-color* is the foreground (text) color and *bg-color* is the background (box surrounding the text) color. If a single color is specified, it is treated as the foreground color. See **User Interface Colors** in the **Terminology** section for an explanation of how colors may be specified. Set the value to *'disable'* to turn off highlighting.

ShowAllBRTemplatesInMRU

Controls whether **BR Templates** with no numbers assigned to them are displayed in the SMS Templates MRU List. When set to 0, BR Templates are not displayed. When set to 1, BR Templates are displayed.

ShowNumberListNumberCount

indicates whether or not to display the Number Count after a Number List is selected on a drop-down list. If retrieving the count is disabled, a link is shown where the Number Count would be shown. Selecting this link will then display the count. Set to 1 to display the count; set to 0 to display the link.

ShowRoutingSetNumberCount

indicates whether or not to display the Number Count after an 8MS Routing Set is selected on a drop-down list. If retrieving the count is disabled, a link is shown where the Number Count would be shown. Selecting this link will then display the count. Set to 1 to display the count; set to 0 to display the link.

ShowSmsTemplateNumberCount

indicates whether or not to display the Number Count after an SMS Template is selected on a drop-down list. If retrieving the count is disabled, a link is shown where the Number Count would be shown. Selecting this link will then display the count. Set to 1 to display the count; set to 0 to display the link.

TocBg

is the background color of the table of contents (menu frame). See **User Interface Colors** in the **Terminology** section for an explanation of how colors may be specified.

TocModeEnabled

indicates whether the user interface menu is in favorites or normal mode. *All* indicates normal mode; *Favorite* indicates favorites mode. This preference is not normally set by the user. Instead, selecting the red heart below the menu puts the menu into favorites or normal mode.

TocMode

indicates whether or not to show the favorites (red and white hearts) control mechanism. Set to 1 to enable favorites; set to 0 to disable favorites.

TraditionalHyperlinks

indicates whether or not to use traditional hyperlinks on the web pages. Setting this to 0 indicates stylesheets should be used and setting it to 1 indicates traditional hyperlinks should be used. The default preference is set to 0 (stylesheets).

UsageAlertPercent

sets the minimum and interval percentages for Usage Alerts. Format: X%:I%. A user is alerted at login if the companies Number count or GUI, API, or Delete Local transaction count is greater than X% and every I% interval after the initial alert. Set to 0%:0% to disable alerts. Set to X%:0% to alert once at X%. Set to 80%:10% to alert at 80%, 90% and 100%.

WorkingIndicator

If 1 then show the various indicators while waiting for results from the server (similar to an hourglass in windows). If 0 then do not show a working indicator.

The following set of preferences affect system performance for your company.

Auto Reserve

These preferences influence the behavior of Auto Reserve processing. Auto Reserve is an 8MS add-on feature.

AutoRsvHighWaterMark

is the number of autorsv jobs per company during HighVolumeTime.

AutoRsvOffPeakOffset

is the interval to send jobs when not in HighVolumeTime.

AutoRsvPeakHighWaterMark

is the number of autorsv jobs per company during PeakTime.

AutoRsvPeakList

is the Listid of the list to run during PeakTime.

Batch Performance

These preferences influence the behavior of batch processing.

Use caution when changing these values as they can negatively impact performance on your machine. It is recommended that you contact the 8MS Support Team before modifying any of these values.

BatchHighWaterMark

is the number of messages after which batch will stop queueing messages.

BatchUncompletedLimit

limits the number of outstanding batches (status other than Message Complete or Complete) a user can have. A value of 0 means there is no limit.

CPRGen Management

These preferences primarily influence Local **CPRs** generated by **CPRGen** while one preference affects the screen.

Note that **BillToNumber** and **ListName1**, **RAO** and **SFNumber** affect the **Record Management** screen as well.

BillToNumber

is the default value used for Cprgen batch activations of Reserved or Transitional numbers. This is also the default value for the BillToNumber field in the Number Information section of Record Administration.

CprgenPlanRetention

is the number of days to retain local plans generated by cprgen.

ListName1

is the default value used for Cprgen batch activations of Reserved or Transitional numbers. This is also the default value for the Names field in the Listing section of Record Administration.

RAO

is the default value used for Cprgen batch activations of Reserved or Transitional numbers. This is also the default value for the RAO field in the Number Information section of Record Administration.

SFNumber

is the default value used for Cprgen batch activations of Reserved or Transitional numbers. This is also the default value for the SFNumber field in the Number Information section of Record Administration.

CprgenDisplaySize

is the number of records to display in one load to the screen.

LCRGen Management

These preferences influence Local **CPRs** generated by **LCRGen**.

LcrgenPlanRetention

is the number of days to retain local plans generated by lcrgen.

Number List Management

These preferences influence **Number Lists**.

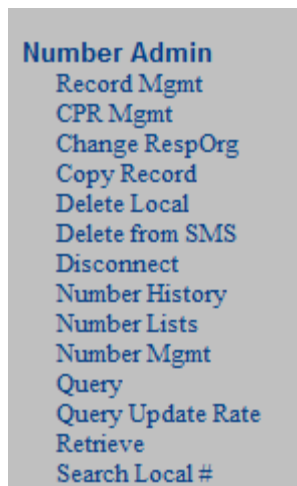
NumListExpire

is the default offset, in days, for number list expiration dates.

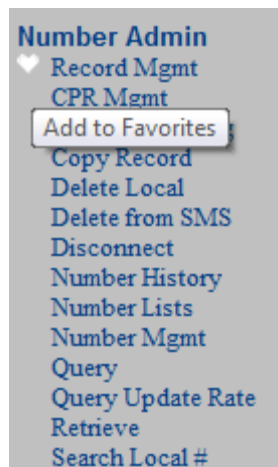
8MS Menu Favorites

When you log in to 8MS, a menu is shown on the left side of your web browser. By default, all menu items available to your user id are shown. You have the option of identifying individual menu items as favorites. After defining your favorites, you may toggle your menu view from all menu items to just your favorites and then back again, whenever you wish.

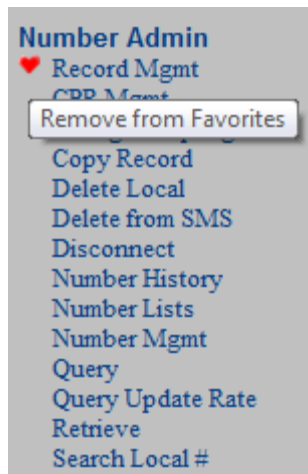
When no menu items are tagged as favorites the menu will appear as follows.



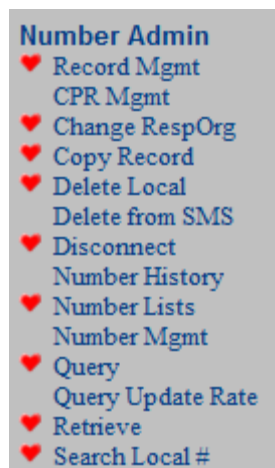
To tag a menu item as a favorite, move your mouse to the left of the menu item. A small white heart will appear to the left of the menu item. A small pop-up hint will also appear, containing the text *Add to Favorites* if your mouse remains there for more than one second.



Click left on the heart. The heart will change from white to red and the hint will change to *Remove from Favorites*.



After selecting all your favorites you will have a series of red hearts that will continue to show, one for each menu item tagged as a favorite. The white hearts will only appear when your mouse floats over one.



If you wish to remove a menu item from your favorites, simply move your mouse over the red heart of that item and click. The heart will change back to white and will disappear when you move your mouse away.

Below the menu, in a separate frame, are three links. The first link is the **Login** button, which allows you to go back to the 8MS **Login** screen. The second link is a **?** which links to the **8MS User Guide**. The third link, to the right of the user guide link, is a red heart.



To toggle your menu view from all items to just favorites, click on the red heart. All non-favorite menu items will be removed from the menu and the red hearts shown to the left of your favorite menu items will also disappear.



The red heart to the right of the user guide link will change to white, indicating that your menu currently shows only your favorites. Any menu items in your favorites may be removed by moving your mouse to the left of the item and clicking on the white heart. The menu item will be immediately removed from the menu.



Clicking on the white heart will restore your menu to all items, and all favorite items will again have a red heart to the left of them. The white heart at the bottom, to the right of the user guide link, will again turn red, indicating that your menu currently shows all your menu items.

Your favorite menu items will be retained across login sessions, so it is not necessary to reselect your favorites each time you log in.

The following tasks are included in the **8MS Routing Set Administration** section:

Analyze Routing

Add numbers to be analyzed by the Routing Set Analysis process.

8MS Routing Set Info

View 8MS Routing Sets and associated number counts and CPR sizes.

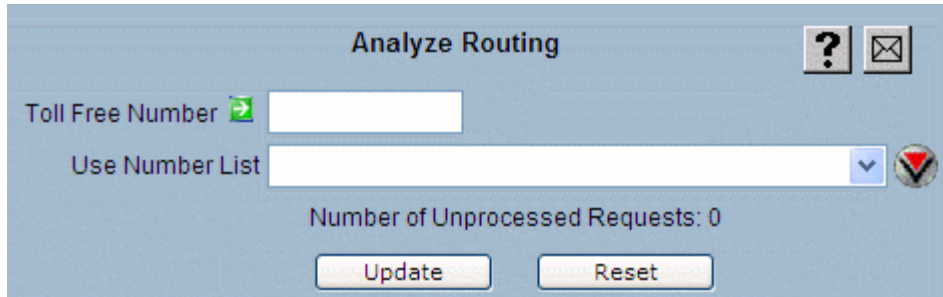
8MS Routing Set Mgmt

Set the name or change the non-routing-affecting data on an 8MS Routing Set.

For more information on 8MS Routing Sets, see the **8MS Routing Set** definition in the **Terminology** section and the **Managing 8MS Routing Sets** tutorial.

This function tries to place a toll-free number or list of numbers into an appropriate 8MS Routing Set. The active record of each number is analyzed, and an appropriate 8MS Routing Set selected. If necessary, a new 8MS Routing Set will be created. For more information, see the [8MS Routing Sets](#) overview.

Since 8MS Routing Set management is generally automatic, the **Analyze Routing** screen is seldom used except by administrators. In the menu frame, select the **Analyze Routing** link located in the **8MS Routing Set** section of the menu. The following will appear:



To place one or more toll-free numbers into an appropriate 8MS Routing Set, you have the option to enter a single toll-free number in the **Toll Free Number** field, or selecting a list from the **Use Number List** drop-down. The format of the number is 10 digits with or without the dashes (for example: 8005551212 or 800-555-1212).

Select the **Update** button to complete the request. The selected number(s) will then be analyzed.

The **Number of Unprocessed Requests** field shows how many numbers are waiting to be analyzed by the 8MS Routing Set analyzer. This field will only show if you are running on a private or dedicated platform.

This function allows you to view information about 8MS Routing Sets. It also allows 8MS Routing Sets to be deleted. For more information on 8MS Routing Sets, see the overview in the [8MS Routing Set Administration](#) section as well as the 8MS Routing Sets tutorial in the [Managing 8MS Routing Sets](#) section.

In the menu frame, select the **Routing Set Info** link located in the **8MS Routing Set** section of the menu. The following will appear on the screen:

- a top area for the 8MS Routing Set selection criteria
- a bottom area for displaying 8MS Routing Set information according to the selection criteria

The top area of **8MS Routing Set Info** appears as follows:

This screen allows 8MS Routing Set selection criteria to be specified. This criteria selects 8MS Routing Sets to be viewed (using either **Retrieve** or **Retrieve All**), or deleted (if the **Delete** button is used). The following describes the selection criteria:

Field	Description
8MS Routing Set	A particular 8MS Routing Set can be selected from the 8MS Routing Set drop-down list. See the 8MS Routing Set overview for information on 8MS Routing Set lists and the Show All button.
Number List	This option will select only those 8MS Routing Sets used by the numbers in the given list.
Company	This option will select only those 8MS Routing Sets within the specified Company. This field will only appear for privileged

companies.

Show Number Count This checkbox will report the number of toll free numbers that use each 8MS Routing Set. This is implemented as an option because the time required to produce per-8MS Routing Set counts is much greater. The **Min** and **Max** fields may be used to limit the search (e.g., find only those 8MS Routing Sets that have 1 or 2 numbers in them).

CPR Length Allows selection of 8MS Routing Sets based on the size of their complex routing information. (Note: this is the length of the data as stored with the 8MS Routing Set. It will not match the CPR size as reported by **CPR Mgmt**).

Show 8MS Routing Set These radio buttons control selection of 8MS Routing Sets based on their names.

- **All:** do not filter based on 8MS Routing Set name.
- **Renamed:** select only those 8MS Routing Sets with user-supplied names.
- **Original:** select only 8MS Routing Sets with system-supplied names. This option is useful, for example, to find 8MS Routing Sets that should be renamed (using **8MS Routing Set Management**).

Once the selection criteria have been set, use either the **Retrieve** or **Retrieve All** button to retrieve the 8MS Routing Set information. **Retrieve** will limit the number of 8MS Routing Sets displayed per page, and allow moving between pages. **Retrieve All** will retrieve all appropriate 8MS Routing Sets as one large list. The report will resemble the following:

Records per Page 18 Set Revert Show Filters			
Record(s): 1 to 8 of 8			
Name	CPR Len	# Paths	# Nodes
Alpha 1	0	0	0
Alpha 2	52	2	3
Beta 1	28	2	3
Beta 2	0	0	0
Beta 3	0	0	0
gerry rename test	47	2	4

Each row of output shows the 8MS Routing Set name, the count of toll free numbers using the 8MS Routing Set (assuming **Show Number Count** was selected), the length of the complex routing, and the number of paths and nodes in the complex routing. If the CPR length and paths/nodes counts are blank, then the 8MS Routing Set represents a simple (or *turnaround*) record.

The drop-down to the right of the **Original** radio button controls the sorting of the retrieved 8MS Routing Set

data. There are currently six options, allowing sorting by name, number count, or CPR length, either ascending or descending.

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the [Data Lists](#) section of the user guide.

Shortcuts

Depending on your user permissions and preferences, you may notice that certain fields are highlighted in various ways. A highlighted field that is a normal hyperlink is a Shortcut to a particular function for this data item. A highlighted field with an unusual appearance is a menu containing a set of Shortcuts related to this data item. See [Shortcuts](#) for details.

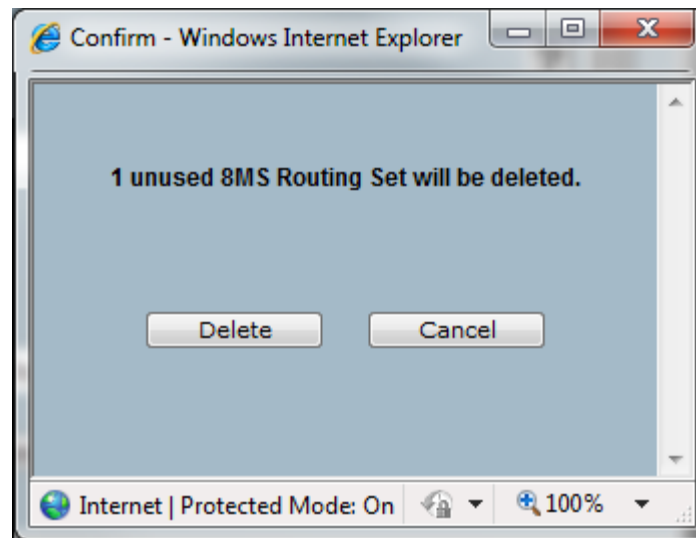
Number Lists

Since it is sometimes necessary to see what toll free numbers are affected, you may create a number list to view in **Search Local #** or **Search Local Rec**. If you would like to create a number list, select the [Create Number List](#) button. The standard number list creation popup will appear. Create the number list as you would normally. See [Number List Popup](#) for more information.

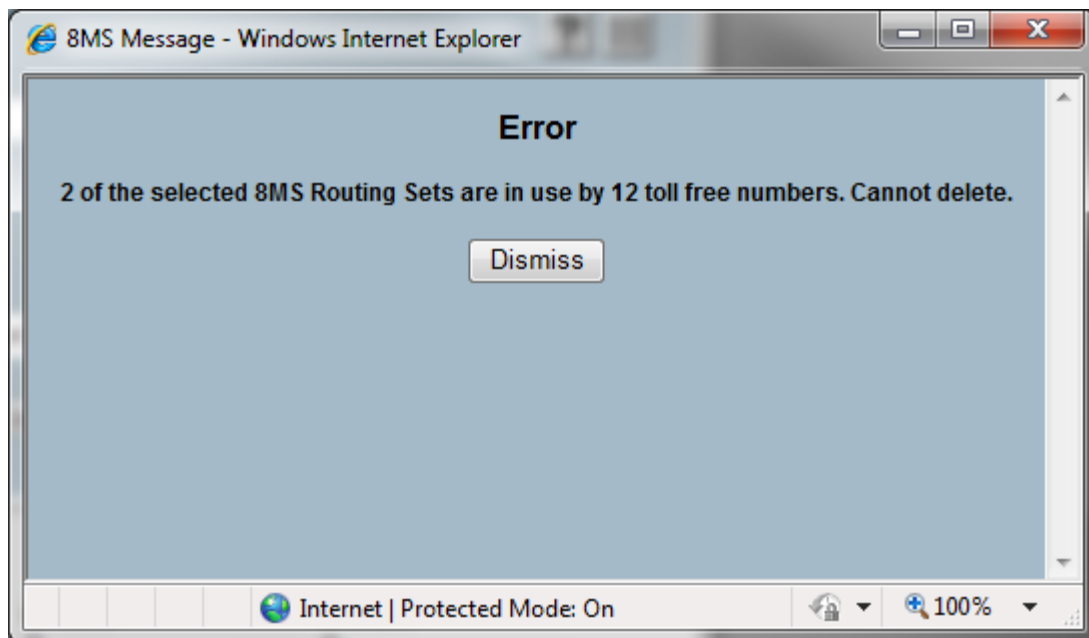
Deleting 8MS Routing Sets

If the [Delete Templates](#) button is used instead of a retrieve button, then a request to delete 8MS Routing Sets is made. The 8MS Routing Sets to be deleted are those that are specified by the selection criteria in the top section (i.e., those that would otherwise be retrieved).

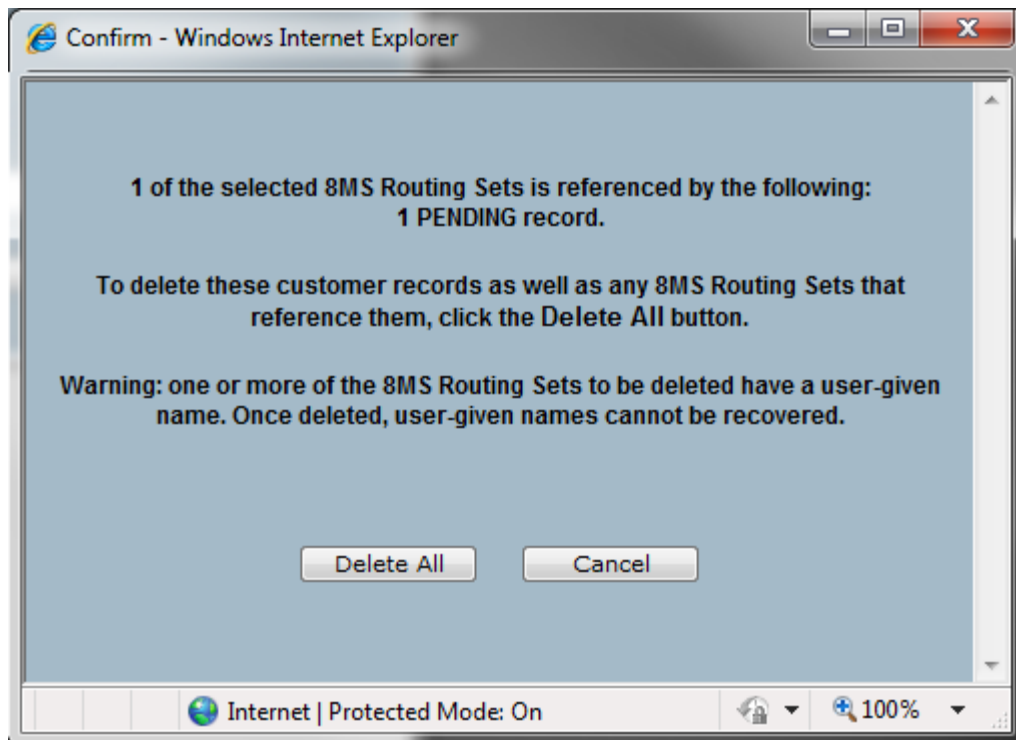
A request to delete one or more 8MS Routing Sets will result in a confirmation window:



An 8MS Routing Set which has Active or Sending records pointing at that Routing Set may not be deleted. If a user attempts to delete an 8MS Routing Set meeting this condition the following message will appear.



An 8MS Routing Set is considered in use if any customer records point at it. Any customer record can point at an 8MS Routing Set (i.e. those with a status other than Active or Sending). This means that even though the count reported by **8MS Routing Set Info** is zero, the 8MS Routing Set could still be in used because some non-Active/non-Sending records point to it. An 8MS Routing Set which has records only in states other than Active or Sending may be deleted. However the records must also be deleted. If a user attempts to delete an 8MS Routing Set meeting this condition the following message will appear.



If any of the 8MS Routing Sets to be deleted have user-assigned names, this is also noted, as shown in the example above.

The **Search Local Records** screen can be used to find the records pointing to a particular 8MS Routing Set.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [8MS Routing Set Info Preferences](#) for details on customizing this screen.

This function allows you to view, rename, update, or delete a particular 8MS Routing Set.

To access this screen, select the **Routing Set Mgmt** link located in the **8MS Routing Sets** section of the menu. The **8MS Routing Set Management** screen will be displayed.

The screen is divided into two main areas:

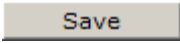
- a top area for the 8MS Routing Set selection
- a bottom area for viewing a selected 8MS Routing Set

When this screen is initially displayed you must select an 8MS Routing Set from the drop-down list. Selecting an 8MS Routing Set will display its **Description**. See the [8MS Routing Set](#) overview for information on 8MS Routing Set lists and the **Show All** button.

The following is the 8MS Routing Set selection screen:

After an 8MS Routing Set is selected, there are several options available to the user:

- To rename the 8MS Routing Set, enter a new name in the field labeled **Rename selected 8MS Routing Set to**. You may also update the value in the **Description** field. After entering a new name, and optionally updating the description, select the **Save** button. The 8MS Routing Set will be renamed, and if appropriate, its description will be updated.
- A pdf report of an 8MS Routing Set may be generated. To generate a report of the currently selected 8MS Routing Set select the **View** button. For a description of the report and its associated popup, see [Toll Free Number/Routing Set Report](#).
- The **8MS Routing Set Management** screen allows a selected Routing Set to be deleted by hitting the **Delete** button. In order to delete a selected 8MS Routing Set, there can be no numbers using it. If the 8MS Routing Set is not empty, a window will appear giving the count of numbers currently using the 8MS Routing Set, and the delete operation is aborted.

- The final option after selecting an 8MS Routing Set is to enter a toll free number in the field labeled **Update CAD Info from Toll Free Number**. This option allows the 8MS Routing Set information to be updated to reflect the given number. The number supplied must currently exist in the selected 8MS Routing Set. After filling in a toll free number, select the  button, and the 8MS Routing Set will be updated.

Note that this does not result in changes being sent to SMS/800; it is a local update only. This option is used to update non-routing affecting information such as customer contact or directory information, and should be considered by advanced users only.

CPRgen and **LCRgen** are 8MS add-on products that automatically generate complex geographic routing from user-supplied input. When very large routing plans are needed it becomes impractical to create and manage them manually. Both **CPRgen** and **LCRgen** provide an alternative, reading user input and automatically generating complex records.

The following tasks are included under CPR Generation:

- CPR Generator** **CPRgen** generates complex geographic routing based on the following CPR routing nodes: 6-digit (NPA/NXX), NPA, LATA, state or 10-digit number, ultimately routing to POTS or toll-free numbers. It provides a simple way of defining default carriers and blocking calls for routing not specified. Additionally, it allows creating and naming complex routing segments (called *Trees*) with any of the above, and then attaches them to other *Trees* to create the final complex routing.
- LCR Generator** **LCRgen** is a least-cost-routing generator that generates complex geographic routing from user-supplied cost input where users have multiple choices for the carrier they choose to carry their traffic.

CPRgen is an 8MS add-on product that automatically generates complex geographic routing from user-supplied input. When very large routing plans are needed, for example to generate least cost routing CPRs, it becomes impractical to create them manually. **CPRgen** provides an alternative, reading user input and automatically generating complex records that:

- Select a carrier based on one of the following: originating 6-digits (NPA/NXX), NPA, LATA, state, or 10-digit number.
- Direct traffic to POTS numbers based on any of the above.
- Block calls based on any of the above.
- Define a default carrier for calls not matching any origination criteria.
- Create and name complex routing segments (we call them *Trees*) with any of the above, and then attach them to other Trees to create the final complex routing.

The **CPRgen** input is a user-created text file. The maximum size of the file is 2.5 Megabytes. It contains instructions to generate CPRs for one or more toll-free numbers or SMS Templates. It is also possible to request automatic customer record activation if a CPR is successfully generated for a toll-free number.

In its simplest form, the input appears as follows:

```
-START NUM-

-START HDR-
Type:{6DIGIT | 6DIGIT_NOREDUCE | NPA | LATA | STATE | 10DIGIT}
Cprname:CPR-name
Target#:toll-free number
Activate:{Y | N}
Effdate:{NOW | MM/DD/YY HH:MMa}
Source#:source toll-free number
IgnoreInvalidNpaNxx:{Y | N}
ReduceToOther:{Y | N}
MaxMsgsPerHour:N
Pec:cic-code
Pac:cic-code
ServiceArea:type:comma separated list of values
-END HDR-

-START CPR-
C:cic-code[/POTS#]:orval1,orval2,...
N:NPA:cic-code
B:ann-type:orval1,orval2,...
O:cic-code
-END CPR-

-END NUM-
```

In the above specification, the term *orval* means "originating value." It will be a 6-digit number (NPANXX), NPA, LATA, state code, or 10-digit number (NPANXXnnnn), depending on the type of the CPR. For example, if the type is NPA, the orvals would be NPAs. (SMS defined labels may also be used as explained later.)

Customers generating 6DIGIT plans often have a large number (over 50,000) of NPANXX's they want to route. The CPR with a single SD node can be built but is likely to be rejected by SMS because of the large number of nodes and paths. In most cases, restructuring the CPR as an AREA node followed by NXX nodes makes the plan smaller and acceptable to SMS. The Type 6DIGIT (6DIGIT_REDUCE is also accepted) will do just that. Since Type 6DIGIT is going to reduce the CPR to have an initial AREA node, orvals of 3- or 6-digits may be given. If you wish to keep the SD-node based CPR, the Type 6DIGIT_NOREDUCE should be

used and only 6-digit orvals are allowed.

Any number of requests can be made in the input file, each enclosed within **-START NUM-** and **-END NUM-**. In the simple request above, the request consists of:

- A header (delimited by **-START HDR-** and **-END HDR-**).
- A description of the CPR (delimited by **-START CPR-** and **-END CPR-**).

Headers contain the following information:

- The type of CPR input.
- The name of the generated CPR.
- The target toll-free number. If this field is omitted, the CPR is an SMS Template CPR.
- A flag indicating whether or not to automatically send a customer record activation request to SMS/800. SMS Template CPRs cannot be activated.
- If activation is requested, the effective date/time of the new customer record (can be **NOW**).
- If activation is requested, a source toll-free number from which to copy CAD information. If no source number is given, CAD information will be copied forward by SMS/800 from the appropriate existing record.
- If **IgnoreInvalidNpaNxx** is requested, orvals containing NPAs and/or NXXs (NPA, NPANXX and NPANXXnnnn) will be ignored if they contain an NPA or NXX not found in the 8MS list of valid values.
- If **ReduceToOther** is requested, all geographic routing nodes in the CPR will be examined to see if the routing logic on any branch exactly matches the routing logic on the OTHER branch. If so, the branch is removed. If the final result on a node is to remove all but the OTHER branch, then the node is removed (effectively moving the routing logic on the OTHER branch to the node above). This can significantly reduce the size of complex CPRs.
- If activation is requested, 8MS needs to create an IEC list and an IAC list of carriers used by this new record. 8MS does this for the carriers in the new CPR but the IEC and IAC also need to include the PEC and PAC, which SMS will get from the previous record (in time order) for this number. By giving a **Pec** and/or **Pac**, the user can make sure that these carriers are in the computed IEC and/or IAC.
- If activation is requested, you may want to restrict how fast this occurs, especially if you have been warned by SMS that you are exceeding their CPU processing limit. If so, they will have contacted you and told you to limit your number of activations (messages) to N per hour. You should then provide that number with the **MaxMsgsPerHour** parameter and 8ms will pace the activations for you.
- If activation is requested, you may want to specify the Service Area for the record. **ServiceArea** allows you to give a comma separated list for **Network**, **AreaCode**, **Lata**, **State** or **Labels** just as you would on the Record Management screen. For a detailed description of service area values, see [Service Area](#).

The first two header fields (**Type** and **Cprname**) are required. The remaining fields are optional. If activation is specified without supplying an effective date/time, **NOW** is assumed.

Multiple activations may be done in one CPRgen file, but not for the same Target number. That is, multiple activations for the same Target number are not allowed.

If activation is requested and the number is in a Reserved or Transitional state, then SMS will require the parameters ABN, LN, RAO, SF to be provided, which 8MS will get from the company preferences BillToNumber, ListName1, RAO and SFNumber, respectively.

The CPR description consists of lines that begin with a command character (**C**, **N**, **B**, or **O**), with each command taking parameters separated by a colon (:). Each command is described below:

C (carrier): Defines a carrier to handle traffic from the specified values. **C** requires two parameters, a CIC code, and a comma-separated list of the appropriate orvals (NPA/NXX, LATA, state code, etc.). The CIC code can optionally be followed by a slash (/) and a POTS number, indicating that calls from the given originating area should be terminated at a POTS number, not the toll free number (see example below).

N (NPA): Allowed only for 6DIGIT, **N** is used to specify the carrier to be used when an explicit NPA/NXX value is not supplied. Normally, the carrier defined by the **O** command (i.e., the *other* carrier) is used in these cases. However, this is often too restrictive. **N** essentially allows an *other* carrier to be defined for each NPA. It requires two parameters, an NPA and a CIC.

B (block): The **B** command defines values to be blocked. It requires two parameters: the type of announcement (either **OBA** or **VCA**), and a comma-separated list of orvals to be blocked.

O (other): specifies the default carrier. Its only parameter is a CIC code. If no OTHER branch exists (for example, from a T command) then the O command forces the generation of an OTHER branch via the given CIC to the Toll Free Number or, for an SMS Template to #DIAL.

A # character in column 1 indicates a comment line to be ignored. Extra white-space is ignored, thus allowing formatting and line breaks to help in human readability of the data.

The following is an example of a 6-digit input file:

```
-START NUM-

-START HDR-
Type:6DIGIT
Target#:8662998932
Cprname:GenPlan
Activate:Y
Effdate:11/11/05 10:00A
-END HDR-

-START CPR-
C:222:609332,609333,609334,732456,732649,732655,732889,908233,
    908434,908883,908924,908994
C:444:201338,201336,201998,605552,701898,701899,904332
C:555:212
C:110/9085550123:732445,732988
B:OBA:908312,908322
O:555
-END CPR-

-END NUM-
```

The result of this input would be generation of a CPR called **GenPlan** for **8662998932**. Assuming the CPR is successfully generated, a batch job will be created to schedule a customer record for **11/11/05 10:00A**. The generated CPR will have the following behavior:

- Calls from the first set of NPA/NXX values are sent to the toll free number via carrier **222**.
- Calls from the second set of NPA/NXX values are sent to the toll free number via carrier **444**.
- Calls from any NXX in NPA 212 are sent to the toll free number via carrier **555**.
- Calls from **732445** or **732988** are sent to POTS number **9085550123** using CIC code **110**.
- Calls from **908312** or **908322** are blocked with an **OBA** announcement.
- All other calls are sent to the toll free number via carrier **555**.

Trees

CPRgen supports the combining of different types of routing logic by allowing multiple **-START CPR-** to **-END CPR-** definitions in one request. Each of these definitions is called a *tree* and can be given a name. One definition must have no name, and will serve as the *base* CPR. Trees can be attached to it. Trees can also be attached to other trees. A new command **T** allows one to describe the branches in one tree on which to attach other trees.

T (tree): specifies a tree defined and named in this request is to be attached to these orvals. It requires two parameters, a tree name and a comma-separated list of the appropriate orvals. **OTHER** is an allowed orval.

The following is an example of attaching Trees:

```
# The base CPR is of Type LATA with a 6-digit tree
#   hanging off the OTHER branch of the LATA Tree
-START NUM-

-START HDR-
Type:LATA
Target#:8662998932
Cprname:TreeTest
Activate:N
IgnoreInvalidNpaNxx:Y
-END HDR-

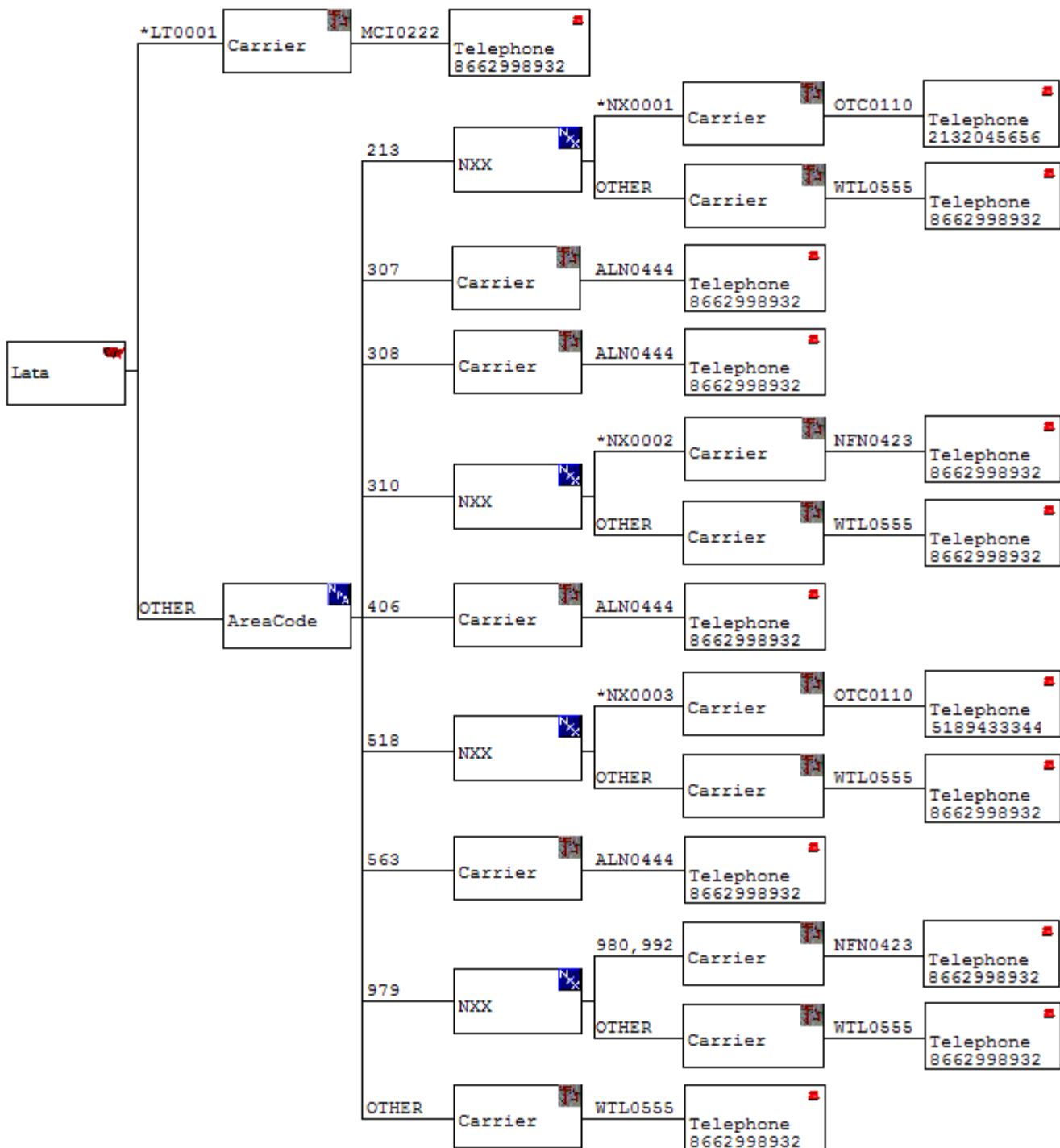
-START CPR-
C:222:138,140,220,222,420,422
T:6DRTE:OTHER
-END CPR-

-START CPR-
# This Tree contains both NPA and 6 digit routing
Name:6DRTE
Type:6DIGIT
C:110/2132045656:213200,213204,213206,
    213226,213227,213228
C:110/5189433344:518268,518279,518280,518281
C:423:310232,310233,310234,310235,310236,
    979980,979992
C:444:307,308,406,563
O:555
-END CPR-

-END NUM-
```

In this example, the **Type** in the HDR defines the type of the unnamed base CPR (here, the first CPR) as **LATA**. It routes some LATAs with carrier **222** and its **OTHER** branch to the **6DRTE** Tree. The **6DRTE** Tree, of type **6DIGIT**, routes some specific NPANXXs (the **C** commands) to the Toll Free Number and others to POTS numbers. Its **OTHER** branch goes to carrier **555**.

The following is the CPR that the sample input above will generate:



Some rules to note:

- One and only one CPR must have no name; this is the base CPR.
- The Trees can be appear in any order in the input.
- The **Type** field in the HDR specifies the type of all CPRs that do not contain a **Type** directive.
- The **Name** field allows names up to 5 alphanumeric characters.
- **OTHER** is an allowed orval for the T directive.

CPR Branch Labels

CPRgen supports the definition of CPR branch labels and the use of label names as orvals in the **C** and **T**

commands. Labels must adhere to the definition set forth by SMS in the label definitions as defined by SMS in the **REQ-CRC** message in the **Service Management System (SMS)/800 Mechanized Generic Interface Specification** (SR-4592). Label definition types mirror the **CPR Type**. SMS has defined the following *labeltypes*.

- SD - for 6DIGIT labels
- AC - for NPA labels
- LT - for LATA labels
- TD - for 10DIGIT labels
- ST - for STATE labels

A label definition section (delimited by **-START LBLs-** and **-END LBLs-** may follow all CPR definitions. Each label name begins on a new line. The label name can optionally be followed by a slash (/) and a *labeltype*. If no *labeltype* is given, the label will be of the same type as the base CPR. This is followed by a colon (:) and a comma separated list of orvals that match the label type. For example, if this is a SD label then all orvals must be 6 digits.

The following is an example of label definitions:

```
# The base CPR is of Type LATA with a 6-digit tree
#   hanging off the OTHER branch of the LATA Tree
-START NUM-

-START HDR-
Type:LATA
Target#:8662998932
Cprname:TreeTest
Activate:N
IgnoreInvalidNpaNxx:Y
-END HDR-

-START CPR-
C:222:*MYL1,420,422
T:6DRTE:OTHER
-END CPR-

-START CPR-
# This Tree contains both NPA and 6 digit routing
Name:6DRTE
Type:6DIGIT NOREDUCE
C:110/2132045656:213200,213204,213206,
    213226,213227,213228
C:110/5189433344:518268,518279,518280,518281
C:423:*MYSD
O:555
-END CPR-

-START LBLs-
*MYSD/SD:310232,310233,310234,310235,310236,
    979980,979992
*MYL1:138,140,220,222
-END LBLs-

-END NUM-
```

In this example, the **Type** in the HDR defines the type of label ***MYL1** to be LT. Label ***MYSD** is specifically defined as type SD (6 digit).

Some rules to note:

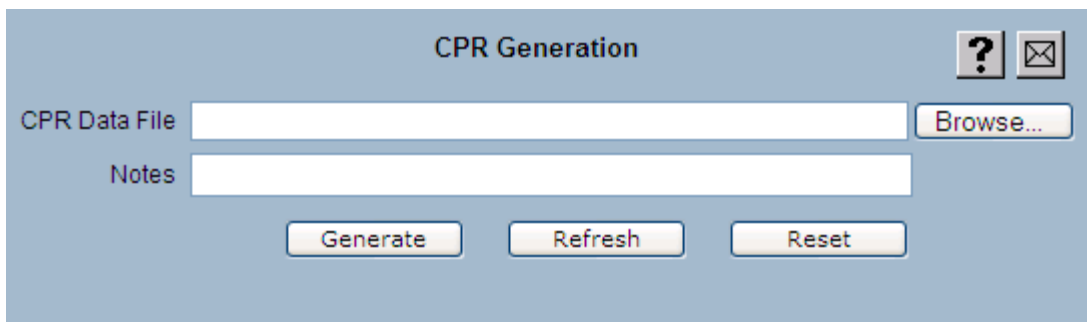
- Label orvals must adhere to SMS specification. In particular, note that SMS limits the number of orvals per label to 255 values.
- SMS defines label names as beginning with a star (*) followed by 1 to 7 upper case alphabetic and/or digits.

- Labels of different types may have the same name, but this is not recommended.
- While **CPRgen** tries to combine branch values to create labels and thus reduce the number of paths and size of a CPR, it will ignore branches with labels defined in the **LBLS** section. In the example above, the *MYL1 branch in the first CPR will be left as is, while **CPRgen** may merge the 420 and 422 values onto a single branch.
- **CPRgen** will not verify that labels used as orvals in the definition of a CPR are subsequently defined. SMS will detect this when the CPR is used.
- The **IgnoreInvalidNpaNxx** selection in the **HDR** section will be honored. That is, if it has been set to **Y**, then type SD, AC, NX and TD labels will have invalid NpaNxx values ignored as defined above.

CPRgen Requests

The **CPRgen** data file is uploaded using the top portion of the **CPR Generation** screen. This screen takes a file name and user comment as input. The input file is read, and CPRs generated as appropriate. If activation is requested for any numbers, a batch job will be generated. Note: even if only one activation is requested, it is still sent as a batch operation.

In the menu frame, select the **CPR Gen** link located in the **CPR Generator** section of the menu. The following will appear in the top section:



The CPR Generator will generate complex records based on input from a user-created file. The format of this file is described above. Use the **Browse...** button to select the appropriate file from your PC. Optionally, **Notes** also may be entered.

Select the **Generate** button to complete the request. The contents of the specified **CPR Data File** will be sent to the 8MS server, and a request to generate CPRs will be made. To view the results of the CPR generation, use the bottom frames of the **CPR Generation** screen.

CPRgen Status

The other two sections of the **CPR Generation** screen are used to check the results of CPR generation. It is possible that CPR generation will fail due to invalid input. In such cases, the status section of the screen will show the errors. Assuming generation is successful, a summary of the generated CPR will be available. It is also possible to view the generated CPR, and, if need be, update it.

In the menu frame, select the **Status** link located in the **CPR Generator** section of the menu. The middle frame will be populated with all recent **CPR Generation** requests:

User	Timestamp	Status	Type	Toll Free #	CPR Name	Source #	Activate
+ bso	03/17/04 03:20P	Complete	[Generate 20 CPRs.]				
+ bso	03/17/04 03:16P	Failed	[Single number, no activation]				
+ bso	03/09/04 02:44P	Complete					
+ bso	03/08/04 04:53P	Complete					

Each line in the output represents one request. If **Notes** were entered, they are shown as above.

Selecting any of the requests will result in the following display in the bottom of the screen:

User ID: gaf	Status: Succeeded
Date/Time: 11/01/16 09:20A	Type: LATA
Toll Free #: 844-568-0170	CPR Name: sms599
Source #:	Activate: No
Notes:	
Edit Plan ☐ Non-Java Version	

CICs Used: 598
 CIC 0444: 597
 CIC 0555: 1
 Other CIC: 0555
 POTS Count: 0

The output summarizes the result of processing the associated input file. If activation was requested, it shows how many such activations are represented in the generated batch job. The button may be used to view the original user input that was supplied for the request. It will appear in a popup window.

The button can be used to delete the selected request.

Clicking on the + icon will expand the entry, producing a line for each generated CPR:

Record(s): 1 to 12 of 21					Next 9	Last	
User	Timestamp	Status	Type	Toll Free #	CPR Name	Source #	Activate
 bso	03/17/04 03:20P	Complete	[Generate 20 CPRs.]				
	03/17/04 03:20P	Succeeded	LATA	866-355-4214	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-355-4216	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-355-4217	BSO Test		No
	03/17/04 03:20P	Succeeded	LATA	866-355-4233	BSO Test		05/01/04 10:00A
	03/17/04 03:20P	Succeeded	LATA	866-355-4242	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-355-4244	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-355-4278	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-355-4286	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-355-4289	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-355-4295	BSO Test		NOW
	03/17/04 03:20P	Succeeded	LATA	866-396-9150	BSO Test		NOW

Each indented line represents one request within the input file. The Status, Type, Toll Free #, CPR Name, Source #, and Activation date are shown. If the generation was for an SMS Template, the Toll Free # will be blank. If activation was not requested for a particular number, **No** will appear.

Selecting an indented entry will show detail about that one request. If the request was successful, a summary of the generated CPR is given, e.g.:

User ID: bso	Status: Succeeded
Date/Time: 03/17/04 03:20P	Type: LATA
Toll Free #: 866-355-4233	CPR Name: BSO Test
Source #: 8666541441	Activate: 05/01/04 10:00A
Notes:	

Download
Edit Plan

CICs Used: 3
 CIC 0110: 1
 CIC 0223: 19
 Other CIC: 0444
 POTS Count: 1
 Block Count: 0
 Label Count: 1

The Download button may be used to view the original user input that was supplied for the request. It will appear in a popup window. The popup will contain only the input for this specific request (as opposed to the entire user input file that would be retrieved as discussed above).

The Edit Plan button will also appear. This button will bring up the generated CPR in the 8MS complex record editor (see [Editing Complex Routing](#)).

If the request failed, then the detail will show the errors for that particular request, e.g.:

User ID: bso	Status: Failed
Date/Time: 03/17/04 02:49P	Type: LATA
Toll Free #: 800-276-5561	CPR Name: test
Source #:	Activate: No
Notes:	

Download

4 errors.

Expected CIC on line # 8 starting at: 33:960
 Expected B, C, N, O, or P on line # 9 starting at: 939,953,956,974,976,981
 Expected B, C, N, O, or P on line # 13 starting at: X:444
 Other CIC Required

Clicking on the  icon will collapse the entry, and return the **CPR Generator Status** display to its initial state.

LCRgen is an 8MS add-on product that automatically generates complex geographic routing from user-supplied cost input where users have multiple choices for the carrier they choose to carry their traffic. To prepare the input, users must know the rate that each of their carriers charges for each NPANXX and have traffic data per NPANXX. This allows the computation of a cost for the traffic from a given NPANXX for each available carrier. For example, if in NPANXX 201200 a user had a carrierA rate of 1 cent/minute and a carrierB rate of 1.5 cents/minute with total traffic of 30 minutes then the cost of using carrierA is 30 and the cost of using carrierB is 45.

There are approximately 173,000 valid NPANXXs while the maximum number of paths in a CPR is approximately 1,000. Therefore **LCRgen** must make choices among the cost data to build a minimal cost CPR that SMS will accept.

The **LCRgen** input is a user-created text file. It contains the data to generate CPRs for one or more toll-free numbers.

In its simplest form, the input appears as follows:

```
-START NUM-

-START HDR-
Target#:toll-free number
Cprname:CPR-name
Notes:up to 50 characters of informal notes
IgnoreInvalidNpaNxx:{Y | N}
CICs:comma-separated list of CICs in the order the cost data will be given
ForceOthercics:comma-separated list of CICs that are allowed on the OTHER branch
-END HDR-

-START COSTS-
NPANXX[/potsnumber]:cost1,cost2,...
-END COSTS-

-END NUM-
```

Any number of LCRgen requests can be made in one input file, each enclosed within **-START NUM-** and **-END NUM-**. In other words, an input file can contain instructions to generate multiple CPRs for different target numbers. Any lines beginning with '#' are ignored so you may sprinkle comments in your file to annotate your data.

Each request contains a header section (delimited by **-START HDR-** and **-END HDR-**) with the following information:

- The target toll-free number.
- The name of the generated CPR.
- Notes to help you identify this particular LCRgen run.
- IgnoreInvalidNpaNxx is requested, NPANXXs in the cost data will be ignored if they contain an NPA or NXX not found in the 8MS list of valid values.
- CICs, the order of which defines how the costs in the COSTS section will be associated with each CIC.
- CICs, that are allowed for the OTHER branch in the resulting CPR. If none are given then all CICs are allowed.

The header fields **CICs**, **Target#**, and **Cprname** are required. The remaining fields are optional.

Each request contains a costs section (delimited by **-START COSTS-** and **-END COSTS-**) with the following information on each line.

- An NPANXX.
- A "/" followed by a POTS number if a POTS number is desired instead of the Toll Free Number (the Target#).
- A ":" followed by a comma-separated list of costs for the carriers from the CICs field in the header. An empty field means this CIC is not available for this NPANXX.

Here's an example.

```
-START NUM-

-START HDR-
Target#: 8662998932
Cprname: GenPlan
CICs: 0111,0222,0333
IgnoreInvalidNpanxx: Y
-END HDR-

-START COSTS-
201200:0072,0103,7800
201202:0178,0103,
201204:0215,0132,
201206:0095,0103,2110
201207:0095,0103,4210
201209:,,33
732302:0095,0103,4210
-END COSTS-

-END NUM-
```

The result of this input would be generation of a CPR called **GenPlan** for **8662998932**. The CPR would have the following

- Calls from 201200, 201206, 201207 and 732302 would route on CIC 0111
- Calls from 201202 and 201204 would route on CIC 0222.
- Calls from 201209 would route on CIC 0333.
- All other NPANXXs would route on whatever the OTHER branch defaulted to.

If this CPR fits in SMS (it most likely will) it is the one generated. However, if it results in, for example, too many paths, then other choices for 201200, 201202, 201204, 201206, 201207 and 732302 would be made to find the minimal cost CPR that fits.

Currently, **LCRgen** uses the geographic routing nodes of SD (six-digit), LT (lata), AC (npa) and NX (nxx) nodes to effect the routing. It will generate labels as needed and maximize the use of the OTHER branch on the nodes.

LCRgen Requests

The **LCRgen** data file is uploaded using the top portion of the **LCR Generation** screen. This screen takes a file name and user comment as input. The input file is read, and CPRs generated as appropriate.

In the menu frame, select the **LCR Gen** link located in the **CPR Generator** section of the menu. The following will appear in the top section:

The LCR Generator will generate complex records based on input from a user-created file. The format of this file is described above. Use the **Browse...** button to select the appropriate file from your PC. Optionally, **Notes** also may be entered.

Select the **Generate** button to complete the request. The contents of the specified **LCR Data File** will be sent to the 8MS server, and a request to generate CPRs will be made. To view the results of the LCR CPR generation, use the bottom frames of the **LCR Generation** screen.

LCRgen Status

The other two sections of the **LCR Generation** screen are used to check the results of CPR generation. It is possible that CPR generation will fail due to invalid input. In such cases, the status section of the screen will show the errors. Assuming generation is successful, a summary of the generated CPR will be available. It is also possible to view the generated CPR, and, if need be, update it.

In the menu frame, select the **Status** link located in the **CPR Generator** section of the menu. The middle frame will be populated with all recent **LCR Generation** requests:

User	Timestamp	Status	Toll Free #	CPR Name
+ gaf	02/04/09 09:44A	Complete	[Standard 2]	
+ gaf	02/04/09 09:30A	Complete	[Special Routing]	
+ gaf	02/04/09 08:41A	Complete	[Standard]	
+ gaf	02/04/09 08:40A	Complete		
+ gaf	02/04/09 08:40A	Complete		

Each line in the output represents one request. If **Notes** were entered, they are shown as above.

Selecting any of the requests will result in the following display in the bottom of the screen:

The output summarizes the result of processing the associated input file. The **Download** button may be used to view the original user input that was supplied for the request. It will appear in a popup window. The

 button can be used to delete the selected request.

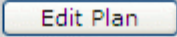
Clicking on the  icon will expand the entry, producing a line for each generated CPR:

User	Timestamp	Status	Toll Free #	CPR Name
 gaf	02/04/09 10:55A	Complete		
	02/04/09 10:55A	Succeeded	866-202-3163	Standard 2
	02/04/09 10:55A	Succeeded	866-202-2964	Standard 1

Each indented line represents one request within the input file. The Status, Type, Toll Free #, and CPR Name are shown.

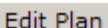
Selecting an indented entry will show detail about that one request. If the request was successful, a summary of the generated CPR is given. If any problems occurred while processing the file, warnings and errors will appear below the summary. Errors indicate the CPR failed to be generated; warnings indicate that some data may need to be cleaned up in the LCR data file, but the CPR was still generated.

User ID: gaf	Status: Succeeded
Date/Time: 02/04/09 10:55A	Type:
Toll Free #: 866-202-3163	CPR Name: Standard 2
Source #:	Activate: No
Notes:	



Plan has 4 paths, size 97
2 Warning(s).

Warning: Invalid NXX, 201201 ignored at line #49

The  button will appear. Selecting this button will bring up the generated CPR in the 8MS complex record editor (see [Editing Complex Routing](#)).

Clicking on the  icon will collapse the entry, and return the **LCR Generator Status** display to its initial state.

System Administration is a collection of screens related to managing Companies, Users and system configuration data. The following tasks are included in the **System Administration** section.

API Types	API Type is an attribute of a user that identifies what API calls this user can access.
Carrier Express	This page explains how to configure a company for access to Carrier Express .
Company	Learn how to add, modify and delete Companies.
Switch Company	Log in as a second company without first logging out.
Change Password	Modify a User's password.
Parameter	View User activity with filtering on Toll-Free Numbers, SMS Templates and other fields.
ROC Admin	Set the login and password for interacting with the SMS/800 ROC service.
Sinch Admin	Create Sinch credentials to use the Carrier Express Sinch services.
TFNR Admin	Set the login and password for communicating with the Somos TFN Registry via their API.
User Types	User Type is an attribute of a user that identifies what user interface screens this user can access.
Users	Learn how to add, modify and delete Users.
WRS Admin	Set the login and password to set up 8MS access to the SMS/800 WRS database for an SMS/800 Entity.

This function allows you to view or modify existing api types and to define new ones. The api type controls which 8MS API calls a user is permitted access to. Each user in the system is assigned an api type on the [Users](#) screen.

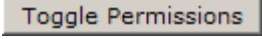
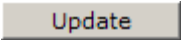
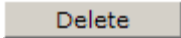
In the menu frame, select the **API Types** link located in the **System Admin** section of the menu. The following will appear on the screen:

1. Enter the API Type:
 - To enter an existing one, select the type from the **Select an existing type** drop-down list. The fields will populate with the existing information for that user type.
 - To add a new API type, enter the type in the **or enter a new one** text field.
2. Carrier Express API calls for a particular carrier may only be sent to Carrier Express if permission has been given to send API calls to that carrier. Access to a carrier is granted by selecting the appropriate checkboxes to the left of the label **Carrier Express Carriers**. If a user's api type does not grant access to a carrier, the API call will be immediately rejected with an error code indicating the user does not have permission to work with that carrier on Carrier Express.



Granting access to Carrier Express is not done by simply granting access to the carriers in **API Types**. For details on configuring a *Company* to use Carrier Express see the [Carrier Express Administration](#) page. Granting access to Carrier Express should be coordinated with the 8MS Support Team since there is additional work to be

done at the carrier site(s) as well.

3. Each API call in the system is represented by an entry in the **Available Permissions** or **Selected Permissions** column. An API call listed in the **Selected Permissions** column is turned on for the current type; an API call listed in the **Available Permissions** is turned off for the current type. Clicking on an API call moves it from one side to the other (i.e., turns the API call on or off). Clicking on a section heading (e.g., **Batch Requests**) moves all of the API calls in the section.
4. Selecting the  buttons will toggle the selection of all the API calls on the screen (i.e., the contents of the **Available** and **Selected Permissions** columns will be swapped).
5. To save changes or to save an API type, select the  button.
6. To delete an API type, select the  button.

The **API Types** screen manages two forms of API access.

1. An 8MS API User will need to be given access to the *Carrier Express Request* API calls. This is controlled by selecting the desired API calls, moving the calls from the *Available Permissions* section to the *Selected Permissions* section.
2. A Carrier Express API User will need to be given access to carriers within Carrier Express. This is controlled by the checkboxes in the top area of the **API Types** screen.

It is unlikely that any single user will ever be granted both forms of access. If you have questions on this, please contact the 8MS Support Team.



This section of the user guide documents administrative information related to Carrier Express. Since Carrier Express features have been integrated into the existing 8MS system there are no specific screens for configuring Carrier Express within 8MS.

Access to Carrier Express features within 8MS is controlled by assigning a Carrier Express API user to an 8MS company and granting that user access to one or more carriers within Carrier Express. This user is treated as a non-8MS user although it is provisioned in 8MS. There may be multiple Carrier Express platforms running, each of which has access to a different set of carriers. An 8MS company is granted access to a single Carrier Express platform. Once the company has been given access to Carrier Express, the company's users will be given access to screens that allow provisioning of data on Carrier Express. Provisioning messages are sent to Carrier Express using the Company assigned Carrier Express API user.

Access to Carrier Express on 8MS is granted to a company, not a user. Prior to configuration on 8MS, a company and user are created on Carrier Express. This may only be done by a member of the Carrier Express Support Team. Now a user must now be created on 8MS with the exact same login and password as exists on Carrier Express. This 8MS user will be given Carrier Express API access to one or more carriers within Carrier Express. After setting up the user and associating it with the company via Company Preferences, carrier provisioning users should be given access to the carrier provisioning screens. The following process describes all the steps necessary to configuring a company for Carrier Express access.

1. Create a new API Type or select an existing one that grants access to the required carriers for this company. This is done using the **API Types** screen. The **API Types** screen has a series of checkboxes, one for each carrier. Select each carrier this company will need to update. Access to individual 8MS API calls on this screen may be ignored since these API calls have to do with access to 8MS, not Carrier Express, and this user will be making API calls to Carrier Express, not 8MS.
2. Now create a new user using the **Users** screen. This user must belong to this company. The API Type selected should be the one created in the previous step. The User Type selected should grant access to the **Password** screen and nothing more, since this login should not be used as an 8MS user.



There is no technical requirement in 8MS that the Carrier Express API user be treated as a special user. This user could be treated as a normal user and could be used for provisioning in 8MS. It is highly recommended that this be avoided to prevent confusion with management of regular 8MS users.

3. Two **Company Preferences** need to be set: **CarExpUser** and **CarExpUrl**. **CarExpUser** should be set to the newly created user. This identifies this user as the one Carrier Express API user for this company on this 8MS platform. Since there may be multiple Carrier Express platforms, **CarExpUrl** should be set to the url of the Carrier Express platform to be used. This value will need to be obtained from a member of the Carrier Express Support Team.
4. Each 8MS user (except the Carrier Express API User) will need to be granted access to one or more carrier tabs on the **Record Management** and **Disconnect** screens. Access to tabs is granted on the **User Types** screen. The **User Types** screen has a series of checkboxes, one for each possible tab in **Record Management** and **Disconnect**. Select all appropriate tabs. Users should probably also be given access to the **Search Local CarExp** screen. If a user has access to the **SMS Msg Status** screen

then access should probably be given to the **CarExpMsg Status** screen. The same is true for the **TFNR Comm Status** and **CarExpLink Status** screen; having access to one implies granting access to the other.

5. If this company has an 8MS API client, the 8MS user used by the client will need to be granted access to the 8MS/Carrier Express API calls. This is done on the **API Types** screen. All Carrier Express API calls are grouped under their own section titled Carrier Express Requests. The API Guide documents these API calls.

This function allows you to view, update or add a company.

In the menu frame, select the **Company** link located in the **System Admin** section of the menu. The following will appear on the screen:

Enter the Company:

- To enter an existing one, select the Company from the **Select an existing company** drop-down list. The existing information will populate in the fields below. Changes may be made to any of the fields.
- To add a new company, enter the name in the **or enter a new one** text field.

Following is an explanation of all remaining fields on the screen.

Field	Description
Enabled	Allows/disallows users for this company to log in.
Enabled Until	Last date that the company will be enabled. Blank means that the company is indefinitely active.

Privileged Allows/disallows users, for this company, to see information from other companies.

EDR Indicates this company is an EDR (Enterprise Disaster Recovery) company.

Icon Filename Name of the company's icon file (usually it's logo) that appears on the welcome screen.

Rename Existing Company New company name if it is being renamed.

Notes Free-format notes for this company.

Parent ID The id of the company that is the "parent" of this company. This is used for support of sub-companies.

Login The database login name for this company.

Password The password for the database login above.

of Connections Maximum number of users, using the company's database login, that can access the database at one time.

Timeout Maximum time, in minutes, that an inactive user may be connected to a database before being logged out.

Default The default value for RespOrg, for a company and its users, when using functions that need a Resp Org, for example, Record Management and Change RespOrg.

Allowed Space delimited list of RespOrgs that are used by this company.

Records Configured A read-only field that indicates whether or not this company is configured for single sign-on.

Configure Click this to configure single sign-on aliases for this company.

Manage Users Click this to add or remove single sign-on ids for all users in this company.

To save changes or to save a new company, click the **Update** button.

To delete a company, click the **Delete** button. button.

To add or delete single sign-on aliases, click the **Configure** button.

To create or delete single sign-on user data, click the **Manage Users** button.

Configuring Single Sign-On Aliases

The **SSO Config** dialog is used to create aliases and to specify the single sign-on identity provider for a company. To view the **SSO Config** dialog, click the **Configure** button. The following dialog will appear over the **Company** screen.

Field	Description
Aliases	The custom URLs -- aliases -- configured for this company. Multiple aliases may be separated by a newline, a space, or a comma.
Alias Count	A read-only field showing the number of aliases defined in the Aliases text area.
Default Alias	The alias shown to users in a company configured for SSO when those users attempt to log in using the <i>secureXX.8msweb.com</i> URL.
Identity Provider	The SSO system used for controlling access to 8MS.

Adding Aliases

To configure a company to use the single sign-on service, an alias must be added in to the **Aliases** text area. When moving focus out of that text area, the values will be reformatted so each alias is on its own line. Additionally, the **Default Alias** drop-down will be populated with all aliases in the text area, and the **Alias Count** read-only field will update with the number of aliases in the text area.

Select the **Default Alias** and the appropriate **Identity Provider**. When done, select the button to add the data to the 8MS database.

A few notes:

- Changes made from this dialog are saved immediately. It is not necessary to do an update from the base **Company** screen.



- Each alias created must be provisioned in the appropriate DNS server(s).

Updating Aliases

To modify the list of **Aliases**, or to change the **Default Alias** or **Identity Provide**, simply make the changes and click the **Update** button, and the changes will be saved to the 8MS database.

Deleting Aliases

To delete all aliases, which will disable single sign-on and return a company back to the legacy 8MS sign-on, click the **Delete** button. All aliases will be removed from the 8MS database.



Configuration data may not be deleted if user SSO data still exists. Refer to the section *Managing Single Sign-On Users* for details on how to do this.

Managing Single Sign-On Users

The **SSO User Management** dialog is used to create SSO user data at the *Identity Provider* provisioned in the **SSO Config** dialog.



SSO Config data must be created before adding SSO user data.

To view the **SSO User Management** dialog, click the **Manage Users** button. The following dialog will appear over the **Company** screen.

SSO User Management: <i>GAF Corporation</i>			
User Login	API	SSO User Id	Email
apiGaf	Yes	n/a	gfinkel+apiGaf@iconectiv.com
gafcorp	--	user set	gfinkel+gafcorp@iconectiv.com
gafcorp2	--	user set	gfinkel+gafcorp2@iconectiv.com
gafcorp3	--	user set	gfinkel+gafcorp3@iconectiv.com
GUI Count 3 API Count 1			
Add to SSO Delete from SSO Reset Passwords Refresh Dismiss			

The dialog initially shows all users in this company, with their current SSO state. Data shown includes

Field

Description

User Login the 8MS login

API indicates whether this user is an API or a GUI user

SSO User Id shows tells you if this user has been provisioned at the Identity Provider

Email is the user's email address. This is important to show because many Identity Providers require unique email addresses.

GUI Count shows the number of GUI users for this company.

API Count shows the number of API users for this company.

A few notes:

- If a company has not had any aliases set up in the **SSO Configure** dialog, a warning will appear indicating this company is not SSO. SSO user data may not be created for companies that do not have an alias configured.
- API users may not be set up as SSO users. All API users are treated as legacy 8MS users.
- Users must be either API or GUI; they may not be both. This is necessary because API users do not use SSO login while GUI users do. Creating a user with both an API Type and a User Type would create a conflict.



Common Behavior for Add and Delete

When adding user data to an Identity Provider or deleting that data, the dialog changes appearance as shown below.

SSO User Management: <i>GAF Corporation</i>			
User Login	Status	API	Email
apiGaf	API User: Skipped	Yes	gfinkel+apiGaf@iconectiv.com
gafcorp	SSO User Added	--	gfinkel+gafcorp@iconectiv.com
gafcorp2	SSO User Added	--	gfinkel+gafcorp2@iconectiv.com
gafcorp3	SSO User Added	--	gfinkel+gafcorp3@iconectiv.com
GUI Count 3 API Count 1			
Add to SSO Delete from SSO Reset Passwords Refresh Dismiss			

The **SSO User Id** is not shown, but a **Status** is added. The above screenshot shows that all GUI users had their SSO data created at the Identity Provider, while the API user was skipped. If there were validation or processing errors, each user with a problem will have the Status shown. Below are the possible status values that can occur when adding to or deleting from the Identity Provider.

Status	Description
SSO User Added	user successfully added to the Identity Provider
SSO User Deleted	user successfully deleted from the Identity Provider
GUI/API Conflict: Skipped	This user has a User Type and an API Type defined. This can be seen and corrected only from the Users screen.
API User: Skipped	This user is an API user. API Users are not configured as SSO users; they use the legacy 8MS password management.
No SSO UserId: Skipped	For deleting a user, if Identity Provider unique id is not stored locally, it cannot be deleted from the Identity Provider. The most likely reason it is not stored locally is because it was never created.
Has SSO UserId: Skipped	For adding a user, if the Identity Provider unique id is stored locally, this user has already been created at the Identity Provider.
Dup Email: Skipped	For adding a user, Identity Providers require unique email addresses. If two users in this company have the same email address, neither user will be added at the Identity Provider. The email address may be corrected from the Users screen.
SSO UserId Taken	Another user already has this 8MS userid. 8MS userids must be unique at the Identity Provider. This user must be given a new

8MS userid. This may be resolved from the **Users** screen.

SSO Error
SQL Error
Malformed URL

Each of these status values indicates an unexpected exception occurred. These exceptions will likely requires investigation by the 8MS support team.

Adding SSO User Data

To create SSO data for GUI users (API users cannot log in via single sign-on), click the **Add to SSO** button. Once all users have been processed, the dialog will appear as shown above.

Deleting SSO User Data

To delete SSO data for GUI users (API users cannot log in via single sign-on), click the **Delete from SSO** button. Once all users have been processed, the dialog will appear as shown above but each successful change will show *SSO User Deleted*.



The add and delete actions may be executed multiple times when resolving conflicts or invalid data; executing these actions again causes no problems with existing SSO user data.

Resetting SSO Passwords

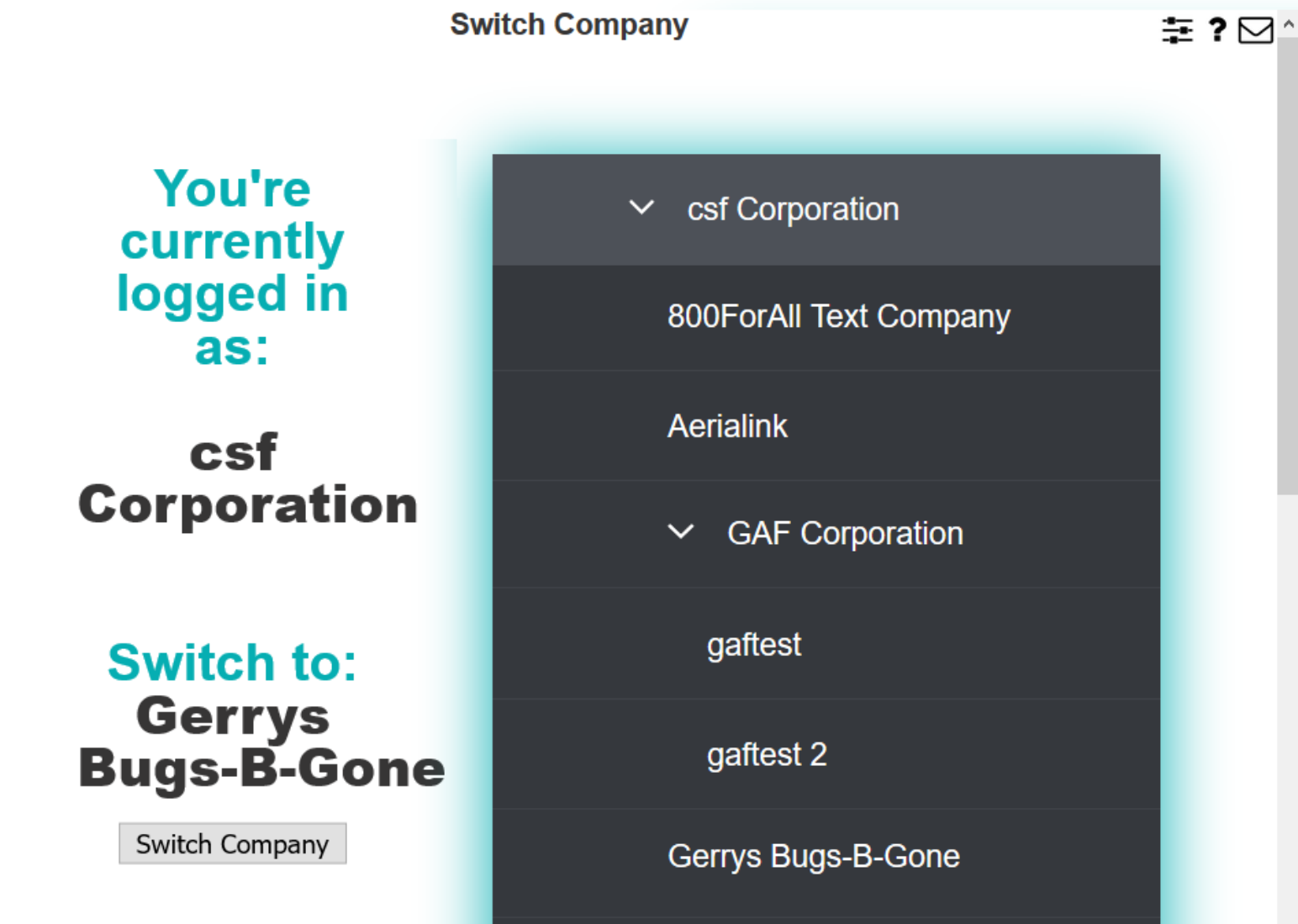
To reset SSO passwords for all users in a company, click the **Reset Passwords** button. Once all users have been processed, the dialog will appear as shown above but each successful change will show *SSO Password Reset*.

Refreshing the View

At any point, to view the latest SSO user data, click the **Refresh** button. This will retrieve the data currently stored in the 8MS database.

This function allows 8MS users to switch between companies on an 8MS platform.

In the menu frame, select the **Switch Company** link located in the **System Admin** section of the menu. The following will appear in the workspace frame:



A company may have one or more sub-companies under its control. Each sub-company may also have sub-companies. In this manner, a parent/child hierarchy of companies is formed. A parent company has the ability to manage data for any sub-company under its control, regardless of whether it is a direct parent, parent of a parent, and so on. A child company may never access its parent's data.

The Switch Company screen provides a hierarchical scrolling box of Companies, starting at the level of your Company. Each reseller shows a down-arrow ▼ to indicate its sub-companies are showing and a right-arrow ► to indicate it has sub-companies but they are not showing. In the screenshot shown above, the top-level company is *csf Corporation*. Sub-companies directly under that company include:

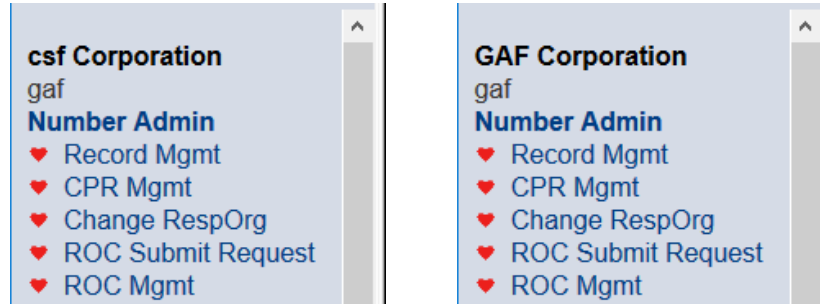
- *800ForAll Text Company*
- *Aerialink*
- *GAF Corporation*
- *Gerrys Bugs-B-Gone*

GAF Corporation, while a sub-company of *csf Corporation*, is also a Reseller. *GAF Corporation* has two sub-companies:

- *gafitest*
- *gafitest2*

To view all sub-companies under a reseller company, click on the  and the list will expand. To hide all sub-companies under a reseller company, click on the  and the list will collapse.

When a reseller needs to manage data for one of its sub-companies, they would use this screen to become a member of that sub-company. To do this, select the company from the scrolling box (if the company is a reseller, avoid clicking the arrow) and then select the **Switch Company** button. Your login remains the same, but your company is now the selected sub-company. You can confirm this by scrolling to the top of the 8MS menu, where you will see your company name and login. The example below shows the login and company before switching to *GAF Corporation* and afterwards.



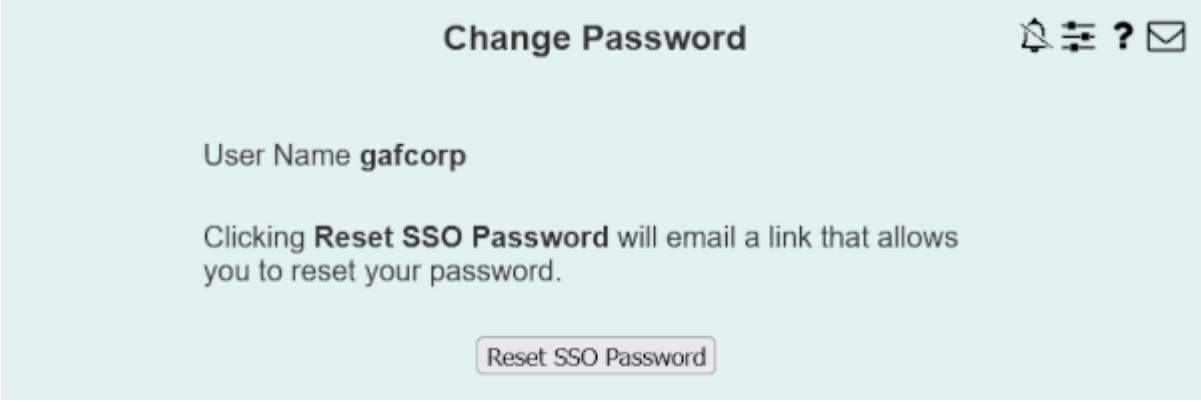
When you switch companies, this action is only remembered for this session. If you log out and log back in, you will revert back to your original company.

This screen allows you to modify a user's password, email address and phone number. For companies configured to use single sign-on, you may only change your password.

In the menu frame, click the **Change Password** link located in the **System Admin** section of the menu.

Company Configured for Single Sign-On

For a single sign-on company, the following will appear on the screen:



The screenshot shows a light blue interface titled "Change Password" in the top center. In the top right corner, there are four icons: a bell, a list, a question mark, and an envelope. Below the title, the text "User Name **gafcorp**" is displayed. Further down, a message states: "Clicking **Reset SSO Password** will email a link that allows you to reset your password." At the bottom center, there is a button labeled "Reset SSO Password".

Click the **Reset SSO Password** button. This will send an email to the email address associated with your login. That email will contain a link that allows you to reset your password.

Company Configured for Legacy 8MS Sign-On

For a legacy 8MS sign-on company, the following will appear on the screen:



The screenshot shows a light blue interface titled "Change Password" in the top center. In the top right corner, there are four icons: a bell, a list, a question mark, and an envelope. Below the title, the form contains the following fields: "User Name" with the value "gaf" in a text box; "Old Password" with an empty text box; "New Password" with an empty text box; "Re-enter New Password" with an empty text box; "Email Address" with the value "gaf@csfcorp.com" in a text box; and "Phone Number" with the value "7323020222" in a text box. At the bottom center, there are two buttons: "Update" and "Reset".

Any or all of the fields **Password**, **Email Address** and **Phone Number** may be modified. This is done by entering the **User Name** and **Old Password** (actually the current password) of the user and then entering

whatever new values you wish to replace.



The **User Name** field is read-only for most users. Only users in a privileged company have permission to modify other users' passwords. For those privileged users, the **User Name** field will be pre-populated with your user id.

You must know the user's current password to be able to make any changes. To ensure that your new password is not mis-typed it must be entered twice, in both the **New Password** and **Re-enter New Password** fields. If these fields do not match then the update will fail.

To activate the change, click the **Update** button.

To restore the original values on the screen, click the **Reset** button.



For users in a privileged company, the set of buttons at the bottom of the screen includes a **Reset SSO Password** button. Clicking this button allows a password reset request to be generated on behalf of another user if that user is in an SSO company. This will send an email to the email address associated with that user's login. That email will contain a link that allows that user to reset their password.

This function allows you to view and set system parameters.

In the menu frame, select the **Params** link located in the **System Admin** section of the menu. The following will appear in the workspace area:

Parameter Administration

Show by Items/Processes

Parameter

Type

Items/Processes

- 8MS Routing Sets:Analyze Routing
- 8MS Routing Sets:Routing Set Info
- 8MS Routing Sets:Routing Set Mgmt
- Carrier Approval:Notifications
- Carrier Approval:Requests
- Carrier Approval:Required
- CPR Generator:CPR Gen
- CPR Generator:CPR Mgmt
- CPR Generator:LCR Gen
- Daemon:appalert

Value

Description

Update Reset

Many parameters are used by particular user interface screens or system processes. To make management of parameters easier, many of the parameters are associated with screens and/or processes. This makes it easier to see what screens or processes use a parameter and allows filtering of parameters by a particular screen or process.

The **Show by Items/Processes** drop-down list contains the names of all user interface screens and system processes. System processes are identified by the prefix *Daemon:*. User interface screens are identified by a

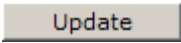
prefix of the menu under which the screens exist. For example, the **Record Management** screen appears in this drop-down list as *Number Admin:Record Mgmt.*

The **Parameter** drop-down list is populated with all possible 8MS parameters. This list may be filtered by selecting any item from the **Show by Items/Processes** drop-down list. When an item from **Show by Items/Processes** is selected, then **Parameter** only shows those parameters associated with the selected screen or process.

Every parameter also has a type associated with it. The **Type** drop-down list contains all possible type values. The list of possible values, a description, and where this type can be viewed and set is shown below.

Type	Description	Where to Set
System	Used by one or more system processes.	This page.
Company Preference	Used by one or more screens or processes and affects all users in a company. If a company value has not been set then it defaults to the system value.	Company Preferences
User Preference	Used by one or more screens and affects a specific user. If a user has not set this preference then it defaults to the system value.	User Preferences
Company/User Preference	Used by one or more screens. If a user has not set this preference then it uses the company value. If a company value has not been set then it defaults to the system value.	Company Preferences User Preferences

When a parameter is selected from the **Parameter** drop-down list, the current **Type**, **Items/Processes**, **Value** and **Description** are shown. **Description** is a read-only value; all the other 3 values may be modified.

To modify a parameter, select the parameter name from the **Parameter** list. Update any of **Type**, **Items/Processes** or **Value**. Now select the  button. If the update is successful then all fields will be cleared.

In order to use 8MS to send, view and manage **ROC Authorization Requests** you must have a valid SMS/800 ROC login and password associated with each **Entity** for which you will use the ROC feature. The **ROC User Administration** screen provides the ability to set up this login and password within 8MS.

In the menu frame, select the **ROC Admin** link located in the **System Admin** section of the menu. The following will appear in the workspace frame:

ROC User Administration

Entity	API User ID	Password	
AR	art01roc		Verify Saved Credentials
YH	yhn01roc		Verify Saved Credentials

Clicking on the **Verify Saved Credentials** button will send a request to the ROC system, verifying that your login is activated at SMS/800 for ROC requests and that the password is correct. You must save your login and password by clicking on the **Update** button prior to running a check.

To provision your company, you must have a valid Somos login with ROC permissions. If you already have a login on Somos, you may use that one. However, it is **strongly** recommended that you create a new login that is dedicated to use within 8MS.



Somos uses password aging when you log onto their system. Should you choose to use the same Somos login for both 8MS ROC transactions and for logging onto Somos, at some point, you will log onto the Somos web site and be forced to change your password. When this happens, you will also need to update that password on 8MS **or ROC requests from 8MS will fail**. If you have separate logins for your Somos work and for ROC, you will never have to deal with password aging, since Somos does not enforce password aging from API users.

If this is the first time a user in your company is setting up their ROC login, there will be one row for each SMS/800 Entity in your 8MS Company, but the **Api User ID** field for each row will be empty. Enter the **API User ID** and **Password** for the appropriate **Entity**. More than one Entity may be updated in a single request. When done entering API User IDs/Passwords, select the **Update** button.



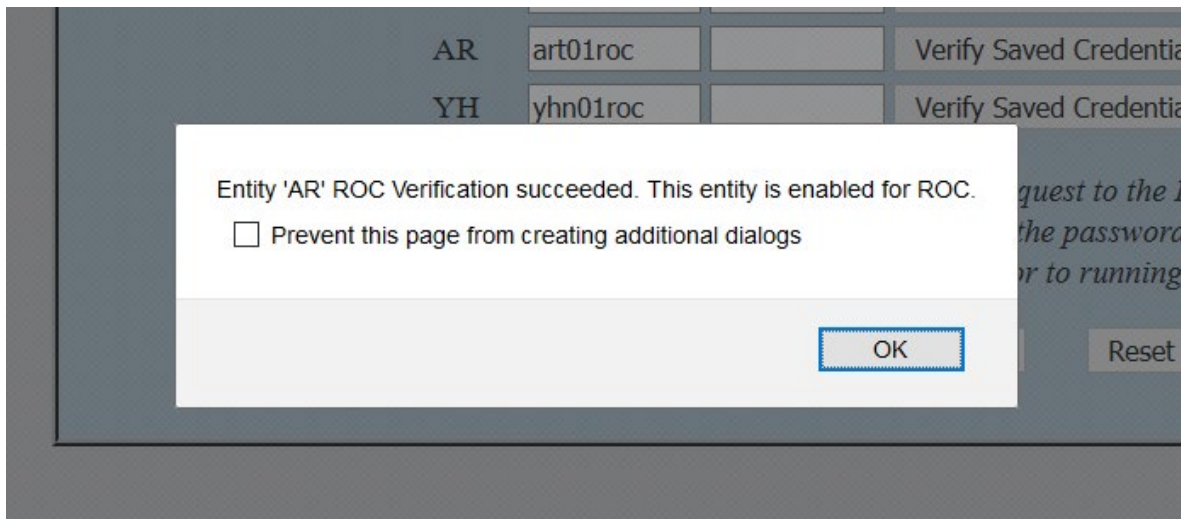
The login and password to be entered here must have been provisioned at SMS/800 and that user must have the **ROC Admin** checkbox checked. If you have not obtained a valid SMS/800 login yet or you have not been granted ROC Admin permission, either see your company's SMS/800 security officer or contact the SMS/800 helpdesk.

If this is not the first time you are setting up your ROC login, the **API User ID** field will be populated with the current value. While

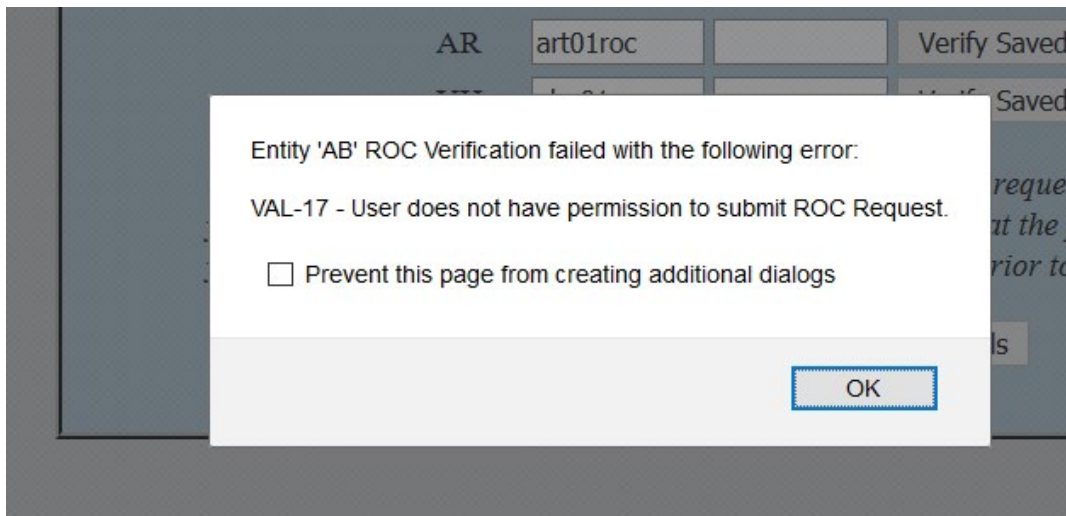
the **Password** field will appear empty, there is a password saved in the 8MS system but it is not shown on the screen.

Verifying Credentials

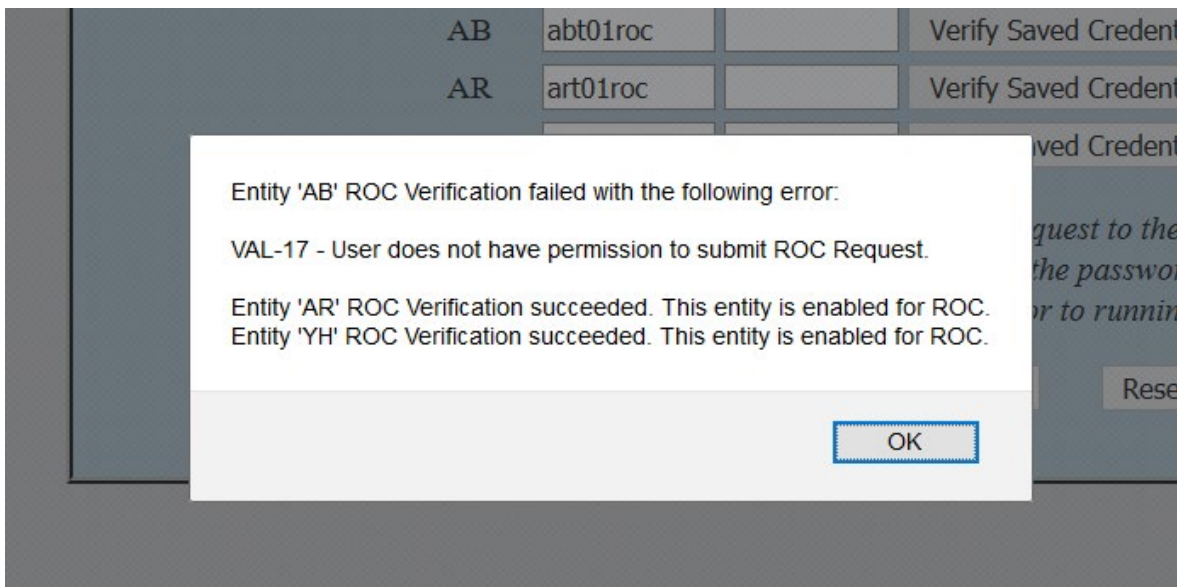
To verify that your Somos ROC login and password are correct, save the values as described above. After performing the save, you may test the login/password pair for a single Entity, by clicking on the **Verify Saved Credentials** button for a specific Entity. If the login/password pair are valid and are configured for ROC at Somos, you will see a message like the following.



If the login/password pair are not valid or if the specified login is not configured for ROC at Somos, you will see a message like the following.



It is also possible to test the login/password pair for all listed Entities, by clicking on the **Verify All Saved Credentials** button at the bottom of the screen. You will see a message for each Entity like the following.



ROC Administration for EDR Companies

In the event that you are managing ROC for an EDR company, this screen will have a slightly different appearance, as shown below.

Entity	API User ID	Password		
AR	art01roc		Verify Saved Credentials	Using Parent Credentials
YH			Verify Saved Credentials	No Credentials Provisioned.

*Clicking on the **Verify Saved Credentials** button will send a request to the ROC system, verifying that your login is activated at SMS/800 for ROC requests and that the password is correct. You must save your login and password by clicking on the **Update** button prior to running a check.*

The difference between a normal 8MS company and an 8MS EDR company, in respect to ROC, is that EDR companies may inherit their ROC login/password from their parent company. To indicate this, one of three possible messages are shown to the right of the **Verify Saved Credentials** button. Possible values are

1. Using Parent Credentials - this company is using the ROC login/password of their parent company for this Entity.
2. Using Own Credentials - this company has it's own ROC login/password for this Entity.
3. No Credentials Provisioned - no ROC login/password have been created for this Entity for either this company or its parent company.

If your company is using their own credentials, a **Delete Cred** button will appear to the immediate right of the **Verify Saved Credentials** button, as shown below.

Entity	API User ID	Password		
AR	art01roc		Verify Saved Credentials	Using Parent Credentials
YH	yhn01gaf		Verify Saved Credentials	Delete Cred Using Own Credentials

Clicking this button will delete your credential. If your parent has a credential for this entity, you will revert to **Using Parent Credentials**, otherwise you will revert to **No Credentials Provisioned**. The **Delete Cred** button will only be available if you have

your own credentials, so you may not delete your parent's credentials.

To allow 8MS to send Carrier Express Activate, Change and Disconnect API calls to Sinch, a company must first have Sinch credentials created. This function allows you to view, add, update, and delete a company's Sinch credentials.

In the menu frame, select the **Sinch Admin** link located in the **System Admin** section of the menu. The following will appear on the screen:

Viewing a Company's Credentials

To view a company's Sinch credentials, select the company from the **Company** drop-down list. If credentials exist for this company, the values will be shown. The **Last Update** field shows the date/time this company's credentials were added or updated.

Adding New Credentials

To add Sinch credentials, select the company in the **Company** drop-down list, then enter the **Client Key** and **Client Secret** values. When done, click the **Update** button.

Updating Existing Credentials

In the event that your Sinch credentials need to be updated, To add Sinch credentials, select the company in the **Company** drop-down list, then enter the **Client Key** and **Client Secret** values. When done, click the **Update** button.

Deleting Existing Credentials

To delete existing Sinch credentials, select the company in the **Company** drop-down list, then click the **Delete** button.

When performing an add, update, or delete, a



message indicating if the action succeeded will appear below the row of buttons. If the request succeeds, all fields will reset back to their initial state.

To enable 8MS to communicate with Somos via the Somos TFN Registry API, a Somos login and password needs to be associated with a Company's Resp Orgs. The **TFNR User Administration** screen provides the ability to set up this login and password within 8MS.

In the menu frame, select the **TFNR Admin** link located in the **System Admin** section of the menu. The following will appear in the workspace frame:

User ID	Password	Entities/Resp Orgs	Actions
ART19TFR		AR	Update Delete
YHN01AAA		YH YHN08 YHN09	Update Delete
YHN01BBB		YHN05 YHN06 YHN11	Update Delete
			Add

If any Somos logins have already been provisioned in 8MS, these will appear, sorted alphabetically by User ID.



Any User IDs being added, or Resp Orgs being modified, must have been provisioned at SMS/800 and approved by the Resp Org's Somos company administrator in the Somos web user interface. The process for doing this is outside the scope of the 8MS User Guide.

Filtering the List

The list of User IDs may be filter by Entity. To do this, enter the **Entity** and select the **Retrieve** button. Select the **Clear** button to clear the **Entity** field and then select the **Retrieve** button to restore the full list.

Adding a New User ID

To add a new Somos login, data will be entered in the bottom row, the one with the **Add** button. Enter the **User ID**, **Password** and **Entities/Resp Orgs** that will use this login. The **Entities/Resp Orgs** field accepts a blank space or comma between items. Each item in this field must be either a 2-alpha Entity or a 5 alpha-numeric Resp Org. When done, select the **Add** button. The User ID will be added, a success message will be displayed at the bottom of the screen, and the newly added item will be sorted alphabetically in the list of User IDS. The **Entities/Resp Orgs** field will convert any lower-case items to upper-case, and commas and extra spaces will be

replaced by a single space.

Modifying an Existing ID

To modify the **Password** or **Entities/Resp Orgs** for a **User ID**, make all changes on the appropriate line and then select the **Update** button. A success message will appear at the bottom of the screen. The **Entities/Resp Orgs** field will convert any lower-case items to upper-case, and commas and extra spaces will be replaced by a single space.

To modify the **User ID** enter the new **User ID** and select the **Update** button. The old User ID will be deleted and the new one added, a success message will be displayed at the bottom of the screen, and the newly added item will be sorted alphabetically in the list of User IDs.

Deleting an Existing ID

To delete a **User ID**, select the **Delete** button. A success message will appear at the bottom of the screen. The User ID will be deleted, a success message will be displayed at the bottom of the screen, and the deleted item will be removed from the list of User IDs.

This function allows you to view or modify existing user types and to define new ones. The user type controls which 8MS tasks a user is permitted access to. It will define the menu items that appear in the 8MS menu on the left. Each user in the system is assigned a user type on the **Users** screen.

In the menu frame, select the **User Types** link located in the **System Admin** section of the menu. The following will appear on the screen:

1. Enter the User Type:

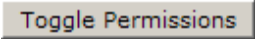
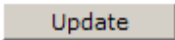
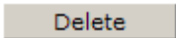
- To enter an existing one, select the type from the **Select an existing type** drop-down list. The fields will populate with the existing information for that user type.
- To add a new user type, enter the type in the **or enter a new one** text field.

2. Each function in the system is represented by an entry in the **Available Permissions** or **Selected Permissions** column. A function listed in the **Selected Permissions** column is turned on for the current type; a function listed in the **Available Permissions** is turned off for the current type. Clicking on a function moves it from one side to the other (i.e., turns the function on or off). Clicking on a menu section heading (e.g., **Number Admin**) moves all of the functions in the section.

3. Also provided are checkboxes for the following:

- **View All Users' Activities:** If checked, this allows users of this type to view all users' activities in the **Activity Log**. An edit field will be provided in the Activity Log to filter by user ID.
- **View Admin Activity:** If checked, this allows users of this type to see both admin and SMS/800 activities in the **Activity Log**. A **View SMS Only** checkbox will be provided in the Activity Log interface to filter out the admin messages.
- **Send Hi Pri Record Changes:** SMS/800 allows each customer a limited number of changes to be tagged as high priority and places those changes at the top of the processing queue. If checked, a **High Priority** checkbox is shown on the **Record Management** and **Copy Record** screens to allow a user to send one or more record changes as high priority. When the limit of high priority changes is reached at SMS/800, the high priority flag is ignored even if it is checked on 8MS.
- **Update Customer Records:** If checked, this allows users of this type to send Record updates to SMS/800. The **Send** button will be provided to allow changes to be sent to SMS/800. Otherwise read-only access is provided to on the Record Management screen.
- **Send Batch:** If checked, this allows users of this type to send batch operations. The **Send Batch** button appear on appropriate screens to allow batch jobs to be sent generated.
- **Reserve/Activate:** If checked, this allows users of this type to immediately activate numbers when they are reserved. A checkbox labeled **Activate** will appear on the Search/Reserve screen. If this checkbox is checked, the **Reserve Batch** popup will contain additional fields to select a source record and destination date/time.
- **Search Only:** If checked, users may not reserve numbers on the **Search/Reserve** screen but they may search for numbers. The **Reserve** and **Batch Reserve** buttons are not shown when this checkbox is checked.
- **Update Avails:** If checked, the **Query** screen provides an additional checkbox labeled **Update 800ForAll Availables**.
- **Record Mgmt Tabs:** Each carrier to be supported in Carrier Express has a screen accessible through a tab on the **Record Management** screen. Access to the screen is granted by selecting the appropriate checkbox. When a checkbox is not checked then access is not granted. If a carrier is not currently supported by 8MS then the checkbox is greyed out and cannot be selected. If a carrier is supported but access is not granted (because the checkbox is not selected) then the tab will appear on the **Record Management** screen but will be greyed out.
- **Disconnect Tabs:** Each carrier to be supported in Carrier Express has a screen accessible through a tab on the **Disconnect** screen. Access to the screen is granted by selecting the appropriate checkbox. When a checkbox is not checked then access is not granted. If a carrier is not currently supported by 8MS then the checkbox is greyed out and cannot be selected. If a carrier is supported

but access is not granted (because the checkbox is not selected) then the tab will appear on the **Disconnect** screen but will be greyed out.

- **Copy Rec Source:** Indicate what sources should be available on the **Copy Record** screen.
 - **Copy Rec Dest:** Indicate what destinations should be available on the **Copy Record** screen.
 - **Template Copy Source:** Indicate what sources should be available on the **Copy SMS Template** screen.
4. Selecting the  buttons will toggle the selection of all the functions on the screen (i.e., the contents of the **Available** and **Selected Permissions** columns will be swapped).
 5. To save changes or to save a user type, select the  button.
 6. To delete a user type, select the  button.

This function allows you to view, update or add users.

In the menu frame, select the **Users** link located in the **System Admin** section of the menu. The following will appear on the screen:

Enter the User ID:

- To enter an existing one, select the user ID from the **Select an existing user** drop-down list. The existing information, except password, will populate in the fields below.
- To add a new user ID, enter the user ID in the **or enter a new one** text field.

Following is an explanation of all remaining fields on the screen.

Field	Description
Name	The user's real name.
Password	The password for this user.
Phone Number	A contact number for this user.
Email Address	A valid email address for this user.
Super User	Allows a user to log in even if the company is disabled.

User Type The user type for this user. (See [User Types](#) for more information.)

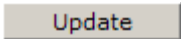
API Type The API type for this user. (See [API Types](#) for more information.)

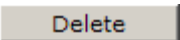
Company The company in which this user belongs. (See [Company](#) for more information.)

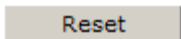
SSO Status A read-only field that shows the company/user state for single sign-on (SSO). Possible values, and their meaning, include:

- *user not set* - this company is configured for SSO but the user does not have SSO data at the Identity Provider.
- *user set* - this company is configured for SSO and the user has SSO data
- *set, but not an SSO company* - this company is not configured for SSO but the user has SSO data
- *not an SSO company* this company is not configured for SSO

Overage Percent This section allows you to modify alert values that are shown in the **Usage Count Limits Alert** popup. Each of these fields reflects the last alert percentage shown to a user. The values of these fields may be set to any value between 0 and 100 percent, although the most common use of these fields is to reset back to 0 to force alerts to show again to a particular user. See the [Limits Alert](#) section of the [Usage Counts](#) screen for details on how these values affect the behavior of the system.

To save changes to an existing user or to create a new user, select the  button.

To delete a user, select the  button.

To throw away unsaved changes and view the currently save values for this user, select the  button.

Single Sign-On Details

With the introduction of single sign-on in 8MS 25.0, there are additional restrictions that did not exist prior to that release. These include

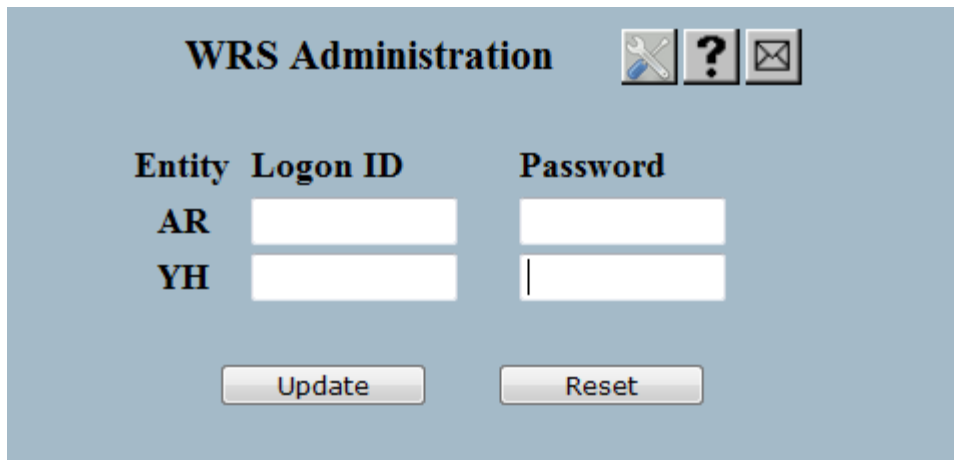
- If a company is SSO, users must be either GUI or API. This means that each user may have an **User Type** or **API Type** set, but they may not have both set.
- Since API users in an SSO company may no longer have GUI access, passwords may only be reset by submitting a ticket to 8MS support.
- All GUI users in an SSO company must have unique email addresses; email addresses may no longer be shared.

Note that this restriction does not include API users.

- Passwords for users in an SSO company are more strict than legacy 8MS users. Passwords must include characters from at least three of the following sets of characters:
 - lower case alphabetic
 - upper case alphabetic
 - numeric values
 - special characters
- When creating a new user, if the company is SSO, the user's SSO data is automatically created on the Identity Provider.
- When deleting a user, if the company is SSO, the user's SSO data is automatically deleted from the Identity Provider.

SMS/800 maintains a database of the change history of all SMS Templates on their WRS (Web Reporting System) database. This history can be viewed from the **SMS Template History** screen. To be able to access this data from within 8MS, an 8MS Company must have access to their SMS/800 Entity data at the SMS/800 WRS database. Access is granted by providing the SMS/800 WRS login and password for an Entity. The **WRS Administration** screen provides the ability to set up this login and password within 8MS.

In the menu frame, select the **WRS Admin** link located in the **System Admin** section of the menu. The following will appear in the workspace frame:



Entity	Logon ID	Password
AR		
YH		

Update Reset

Enter the **Logon ID** and **Password** for the appropriate **Entity**. More than one Entity may be updated in a single request. When done entering LogonIDs/Passwords, select the **Update** button.

Notification Management is a collection of screens related to managing and viewing Notifications. The following tasks are included in the **Notification Management** section.

Notification Alerts

View all available notifications meant for your userid.

Registration Management

Manage your notifications. Specify the events you would like to receive alerts on. Specify how your alerts are delivered and bundled.

Event Log

View events created by the system that could result in notifications if the user has registered for them.

This function allows you to view notifications. The primary function of this screen is to view unread Login notifications however you are also able to view Text and Email notifications that have been delivered to your mobile device and email account. To access this screen, select the **Notification Alerts** link located in the **Notification Mgmt** section of the menu. The screen is divided into three main areas. The top portion allows you to specify criteria on which to search as depicted in the following:

The following is a description of the search criteria:

Field	Description
Event Type	Search for notifications of a particular event type. Select the desired event type from the drop-down list. If you do NOT want to filter according to type of event, then select All from the list.
Start Date - End Date	Search for notifications whose date falls within the given range. Either value may be omitted to select notifications with dates after or before a given value. If only Start Date is specified, all notifications on or after the given date will be included. If only End Date is specified, all notifications on or before the given date will be included.
Start Time - End Time	Search for notifications by date AND time. The Start Time field can be used only if a Start Date has been specified. The End Time field can be used only if an End Date has been specified. When a start/end date has been specified, but no start/end time has been specified, the time is defaulted to midnight of the specified date.
Notify Type	Search for notifications of a particular notify type: <i>Login</i> , <i>Text</i> or <i>Email</i> . Select the desired notify type from the drop-down list. If you do NOT want to filter according to type of notification, then select All from the list.
Bundle	Search for notifications of a particular bundle type: Single, Daily or Weekly. Select the desired bundle type from the drop-down list. If you do NOT want to filter according to a particular bundle type, then select All from the list.
Unread	Checking this checkbox shows only unread notifications. A <i>Login</i> notification is considered read when the list item is selected and the detail has been viewed. All <i>Text</i> and <i>Email</i> notifications are considered to have been read immediately since they were sent to the user outside of 8MS.

Once you are satisfied with your selection criteria, begin your search by clicking on one of the following buttons:

Retrieve retrieves all records matching the search criteria. The results are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves all records matching the search criteria. The results are not grouped into pages. If many records are selected by the given criteria, this may take some time.



By default, all unread *Login* notifications are immediately



loaded when this screen appears.

The **Retrieve** and the **Retrieve All** results will be displayed in the middle frame as shown in the following:

Records per Page 15 Set Revert					Hide Filters	
Record(s): 1 to 15 of 37					Page 1 2 3 of 3	
					Next 15 Last	
Date/Time	Event Type	Notify Type	Bundle	Abstract		
● 03/26/18 10:12A	RO Change	Login	Single	Unsolicited Resp Org change (ART16 -> ART19)		
● 03/26/18 10:12A	Bulletin	Login	Single	8MS 15.0 is coming soon!		
● 03/26/18 10:12A	RO Change	Login	Single	Unsolicited Resp Org change (ART16 -> ART19)		
● 03/26/18 10:12A	User Modification	Login	Single	User gaf updated.		
03/26/18 11:59P	User Modification	Login	Daily	8MS Daily Event Notification		
03/31/18 11:59P	User Modification	Login	Weekly	8MS Weekly Event Notification		
● 01/17/18 10:23A	User Modification	Login	Single	User gaf updated.		
● 01/17/18 10:23A	Bulletin	Login	Single	Abstract for Bulletin 3 event.		

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the [Data Lists](#) section of the user guide.

Item Detail

You can click on any column of an activity listed to obtain detail about that activity. The detail is displayed in the lower frame as shown in the following:

8MS Event Notification	
Event:	Bulletin
Date/Time:	03/26/18 10:12A
Abstract:	8MS 15.0 is coming soon!
Description:	8MS 15.0 is coming soon! Included in this release is the Notification feature which allows users to subscribe to various forms of notifications such as Resp Org Changes, User setting changes and various forms of bulletins.

This function allows you to manage your notification registrations. To access this screen, select the **Registration Mgmt** link located in the **Notification Mgmt** section of the menu. The following will appear in the workspace frame:

Registration Management

31 ? ☐

Event Type	Event Value	Is	Notify Type	Notify To	Bundle	Enabled	Delete
Urgent	filter column...	Not	Login	filter column...	Single	☒	✕
Site Switch		☐	Login		Single	☒	✕
Scheduled Downtime		☐	Login		Single	☒	✕

First Prev 1 Next Last

Add a Row Update

The following is a description of the search criteria:

Field	Description
Event Type	The type of event for which you wish to be notified. Currently supported Event Types include <i>Resp Org Changes</i> , <i>User Modifications</i> , general <i>Bulletins</i> , and <i>Urgent</i> , <i>Site Switch</i> and <i>Scheduled Downtime</i> bulletins.
Event Value	Restricts notifications to a particular value for the specified Event Type . Currently supported Event Values include a comma-separated list of toll-free numbers for <i>Resp Org Change</i> notifications. If no Event Value is specified, then you will receive notifications for all events of this type.
Is Not	Restricts notifications to the specified Event Type but for values other than the ones specified in Event Value .
Notify Type	The type of notification you wish to receive. Currently supported Notify Types include <i>Email</i> , <i>Text</i> and <i>Login</i> (viewing messages from the Notification Alerts screen).
Notify To	For a Notify Type of <i>Email</i> or <i>Text</i> , this is the email address or text address to which the notification is delivered. For <i>Text</i> , the message is sent out as an email and is addressed to <i>mobile-number@carrier-email-domain</i> . For example, if your mobile number is 7323020222 and your carrier is AT&T, your Notify To value would be <i>7323020222@txt.att.net</i> . Contact your carrier if you are unsure of the the email domain for that carrier.
Bundle	Notifications can be sent as <i>Single</i> (as they occur) or they can be grouped in <i>Daily</i> or <i>Weekly</i> bundles. Daily notifications are sent at the end of the day. Weekly notifications are bundled from Sunday to Saturday and sent at the end of the day on Saturday.

Users should be cautious when specifying a **Notify Type** of *Text* as you can become overwhelmed with either a large number of messages or a single very large message.

Specifically:



- Users may not select a **Bundle** value of *Daily* or *Weekly* as the messages sent for these bundle types can be so large that they are effectively unreadable.
- Users for companies that regularly acquire new toll-free numbers can become overwhelmed with text messages. It is recommended that users wanting to receive *Resp Org Change* notifications should **not** specify a **Notify Type** of *Text* and should specify a **Bundle** value of *Daily* or *Weekly* or viewing these on the screen can also become overwhelming.

Enable To make it easier to manage your registrations, you do not need to delete a registration row to stop those particular notifications. Instead, you can simply disable the particular registration by unchecking the checkbox, and then checking it when you want to receive those notifications again.

Delete Clicking on the **X** icon will delete this registration row.

Editing Registrations

To add a registration, click on the **Add a Row** button. A new row will appear at the bottom of the screen. Set all appropriate values for this registration row.

To modify an existing registration, make all appropriate changes directly to the registration row.

To delete an existing registration, click the **X** icon to the far right of the registration row.

When you have completed all changes, click the **Update** button. All your updates will be performed and a message will appear indicating the number of adds, modifications and deletes that have occurred. Please note that no changes will be saved until you have clicked on the **Update** button.



If you currently have no registrations defined, when you go to this screen, the screen will automatically create three new registrations for *Urgent*, *Site Switch* and *Scheduled Downtime* bulletins. These registrations will not be created unless you click on the **Update** button. You may modify these rows if you wish to receive them as Email or Text and you may also delete them if you do not wish to receive these notifications.

This function allows you to view system events based on various criteria. It also allows creation of some event types such as bulletins. To access this screen, select the **Event Log** link located in the **Notification Mgmt** section of the menu. The screen is divided into three main areas. The top portion allows you to specify criteria on which to search as depicted in the following:

The following is a description of the search criteria:

Field	Description
Event Type	search for events of a particular type. Select the desired event type from the drop-down list. If you do NOT want to filter according to type of event, then select All from the list.
Start Date - End Date	Search for events whose date falls within the given range. Either value may be omitted to select events with dates after or before a given value. If only Start Date is specified, all events on or after the given date will be included. If only End Date is specified, all events on or before the given date will be included.
Start Time - End Time	Search for events by date AND time. The Start Time field can be used only if a Start Date has been specified. The End Time field can be used only if an End Date has been specified. When a start/end date has been specified, but no start/end time has been specified, the time is defaulted to midnight of the specified date.



Clearing all filters may result in many events being returned, and may take a very long time.

Once you are satisfied with your selection criteria, begin your search by clicking on one of the following buttons:

Retrieve retrieves all records matching the search criteria. The results are displayed in groups, one page at a time. If multiple pages result, hyperlinks are displayed for navigating between pages.

Retrieve All retrieves all records matching the search criteria. The results are not grouped into pages. If many records are selected by the given criteria, this may take some time.

The **Retrieve** and the **Retrieve All** results will be displayed in the middle frame as shown in the following:

Records per Page 15		Set	Revert	Hide Filters	
Record(s): 1 to 15 of 43		Page 1 2 3 of 3		Next 15	Last
Date/Time	Event Type	Abstract	User Id	Actions	
03/28/18 02:14P	User Modification	Profile for gaf updated.	gaf		
03/28/18 11:16A	User Modification	User gaf updated.	gaf		
03/28/18 11:15A	User Modification	User gaf updated.	gaf		
03/26/18 10:12A	RO Change	Unsolicited RespOrg change (ART16 -> ART19)	gaf		
03/26/18 10:12A	RO Change	Unsolicited RespOrg change (ART16 -> ART19)	gaf		
03/26/18 10:12A	RO Change	Unsolicited RespOrg change (ART16 -> ART19)	gaf		
03/26/18 10:12A	RO Change	Unsolicited RespOrg change (ART16 -> ART19)	gaf		
03/26/18 10:12A	Bulletin	8MS 15.0 is coming soon!	gaf		
03/26/18 10:12A	User Modification	Abstract for User Mod. updated.	gaf		

Data List Links

The links and text field shown at the top of this result list are common features of all Search screens. Details on these links is discussed in the [Data Lists](#) section of the user guide.

Item Detail

You can click on any column of an activity listed to obtain detail about that activity. The detail is displayed in the lower frame as shown in the following:

Event Id: 40

Date/Time: 03/26/18 10:12A

Company: csf Corporation

User Id: gaf

Event Type: Bulletin

Event State: Complete

Abstract: 8MS 15.0 is coming soon!

Event Value:

Description: 8MS 15.0 is coming soon! Included in this release is the Notification feature which allows users to subscribe to various forms of notifications such as Resp Org Changes, User setting changes and various forms of bulletins.

Creating New Events

It is possible to manually create some events. This is primarily intended to allow users to create the various types of bulletins. To create a new event, click on the [New Event](#) button. The following will appear in the bottom frame.

The screenshot shows a web form for creating an event. On the left, there are labels for 'Event Type', 'Abstract', and 'Description'. To the right of 'Event Type' is a dropdown menu currently showing 'Bulletin'. Below 'Abstract' is a text input field. Below 'Description' is a larger text input field. At the bottom of the form are two buttons: 'Add' and 'Reset'.

Select the appropriate **Event Type**, then type in an **Abstract** and **Description** for the bulletin. When done, click on the **Add** button. A new bulletin will be created and then delivered to all users requesting notifications of the specified type.

Copying an Existing Event

If you want to create a new bulletin event based on an existing one, select the  button to the right of the source event shown in the middle frame. The same creation screen will appear in the bottom frame, but it will be populated with the values of the source event. Modify the fields of this event as you see appropriate and then click on the **Add** button. A new bulletin will be created and then delivered to all users requesting notifications of the specified type.

Deleting Events

It is possible to delete existing events. In the middle frame, click on the  button to the right of the event you wish to delete. After clicking on the confirmation box, the event and all associated notifications will be deleted.



Be cautious when deleting events as all associated notifications will also be deleted. If the system is processing notifications when this is done, it is possible that some users will receive the notification while others will not.

Table Administration is a collection of screen utilities for managing SMS/800 data that is downloaded and maintained by 8MS. The following tasks are included in the **Table Administration** section.

Carrier Table Admin	Manage Carriers (CICs) used in defining routing for Toll-Free Number SMS CAD records and SMS Templates.
LATA Table Admin	Manage LATAs used in defining routing for Toll-Free Number SMS CAD records and SMS Templates.
NPA Table Admin	Manage NPAs used in defining routing for Toll-Free Number SMS CAD records and SMS Templates.
RespOrg Table Admin	Manage NPAs used throughout the 8MS system.

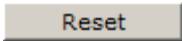
This function allows you to add, delete, or modify entries in the Carrier table.

In the menu frame, select the **Carrier** link located in the **Table Admin** section of the menu. The following will appear on the screen:

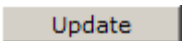
The screenshot shows a 'Carrier Administration' window with a title bar containing a question mark and a close button. The form contains the following elements:

- 'Select an existing carrier' with a dropdown menu.
- 'or enter a new CIC' with a text input field.
- 'ACNA' with a text input field.
- 'Enabled' with a checkbox.
- 'Inter-LATA' and 'Intra-LATA' with checkboxes.
- Three buttons at the bottom: 'Update', 'Delete', and 'Reset'.

Field	Description
Select an existing carrier	Selecting a carrier from this drop-down list will populate the screen with information about the selected carrier.
CIC	A 1-4 digit <i>Carrier Identification Code</i> that identifies this carrier.
ACNA	A 3 letter <i>Access Carrier Name Abbreviation</i> which uniquely identifies this carrier. Each carrier has a one-to-one relationship with an ACNA; a carrier may have multiple CICs.
Enabled	This checkbox indicates whether or not this CIC will be shown on the Record Mgmt and EditPlan screens when selecting what carrier will carry your traffic.
Inter-LATA/Intra-LATA	These checkboxes indicate what type of traffic this carrier can handle.

Hitting the  button clears all fields; resetting the screen as if you had just selected it.

Adding a Carrier

To add a new carrier, enter the 1-4 digit CIC in the **or enter a new CIC** text field, enter the 3 letter ACNA in the **ACNA** field, select the **Enabled** checkbox if appropriate and select the appropriate **Inter-LATA** and **Intra-LATA** checkboxes. When done, select the  button.

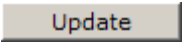
Modifying a Carrier

The enabled status of a carrier is automatically set when the system clean-up process runs. If the carrier is enabled and is not referenced by any toll-free numbers in the system it is disabled. If the carrier is disabled and is referenced by any toll-free numbers in the system it is enabled.

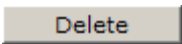
To modify a carrier, select the carrier from the drop-down list.

To manually enable or disable a carrier select or unselect the **Enabled** checkbox as appropriate.

Set the **Inter-LATA** or **Intra-LATA** checkboxes appropriately if they are to be changed.

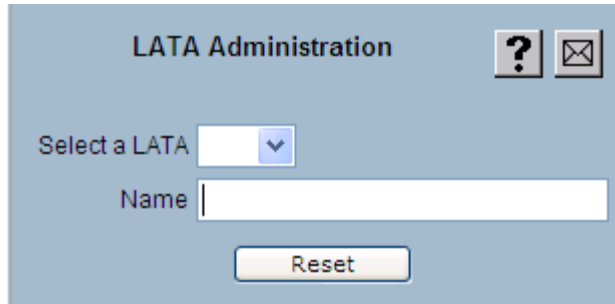
Now select the  button.

Deleting a Carrier

To delete a carrier, select the carrier from the drop-down list and select the  button.

This function allows you to view LATA information. No adds, updates, or deletes can be made from this screen.

To access this screen, select the **LATA** link located in the **Table Administration** section of the menu. The following will appear in the workspace frame:

The screenshot shows a web interface titled "LATA Administration". In the top right corner of the header area, there are two icons: a question mark and an envelope. Below the header, there is a label "Select a LATA" followed by a dropdown menu with a blue arrow icon. Underneath that is a label "Name" followed by a text input field. At the bottom center, there is a "Reset" button.

Choose a LATA from the **Select a LATA** dropdown field. The LATA **Name** will be populated.

The NPA table is automatically updated by a synchronization process in the 8MS application. However, this function allows you to add, delete, or modify entries in the NPA table.

To access the **NPA Administration** screen, select the **NPA** link located in the **Table Admin** section of the menu. The following will appear in the workspace frame:

1. Enter the NPA:
 - To enter an existing one, select the NPA from the **Select an existing NPA** drop-down list. The fields below will populate with existing information.
 - To add a new NPA, enter the NPA in the **or enter a new one** text field.
2. For a new NPA, enter values in the following fields:
 - **State**
 - **Geographic Code**
3. The **NXX List** is provided as a read-only list of the NXX's included in the selected NPA.
4. To save changes or to save a new NPA, select the **Update** button.
5. To delete an NPA, select the **Delete** button.

This function allows you to add, delete, or modify entries in the Resp Org table. This table defines which Resp Orgs are considered to have permission for this instance of the 8MS application.

To access the **RespOrg Administration** screen, select the **RespOrg** link located in the **Table Admin** section of the menu. The following will appear in the workspace frame:

The screenshot shows a web application window titled "Resporg Administration". It contains a dropdown menu for selecting an existing RespOrg, a text field for entering a new one, and two text fields for Name and TRN. At the bottom, there are three buttons: Update, Delete, and Reset.

1. Enter the RespOrg:
 - To enter an existing one, select the Resp Org from the **Select an existing Resporg** drop-down list. The fields below will populate with existing information.
 - To add a new Resp Org, enter the name in the **or enter a new one** text field.
2. For a new Resp Org, enter values in the following fields:
 - **Name**
 - **TRN**
3. To save changes or to save a new Resp Org, select the **Update** button.
4. To delete a Resp Org, select the **Delete** button.

Tools is a collection of screens that allows 8MS system data to be viewed and, where appropriate, managed. The following tasks are included in the **Tools** section.

API Message Status	View messages to and from the 8MS API.
CarExp Link Status	View the status of the Carrier Express interface.
CarExp Message Status	View messages to and from Carrier Express.
Connections	View database connection information.
Geographic Information	View information related to geographic areas, used for toll-free number CPRs.
Process Control	View and manage 8MS system processes.
SMS Error Messages	View the text of all SMS/800 error messages.
TFNR Link Status	View the status of the SMS/800 Registry (TFNR) interface.
SMS Message Status	View messages to and from SMS/800.

This function allows you to view the status of the current API messages in the 8MS application.

To access the **API Message Status** screen, select the **API Message Status** link located in the **Tools** section of the menu. The screen is divided into three sections: Incoming Messages, Outgoing Messages and a message detail display area. The following is the Incoming Messages portion of the screen:

310 Incoming		☒ Unsolicited	Limit 25	Refresh	Delete	DeleteAll
Seq #	Date/Time	Request ID	Route	Term Rpt	Err Code	
60799	06/04/20 12:58P	OA89ZX2TY8	TRV	DONE__	0	
60798	06/04/20 12:58P	OA89ZX2TY8	TRV	DENIED	1	
60797	06/04/20 12:58P	OA89ZX2TY8	TRV	COMPLD	0	
60796	06/04/20 12:58P	OA89ZX2TY8	TRQ	COMPLD	0	
60795	06/04/20 12:58P	OA89ZX2TY8	TRV	COMPLD	0	
60794	06/04/20 12:58P	OA89ZX2TY8	TRQ	COMPLD	0	
60793	06/04/20 12:58P	OA89ZX2TY8	TRQ	COMPLD	0	
60792	06/04/20 12:57P	OA89ZX2TY8	TRV	COMPLD	0	
60791	06/04/20 12:57P	OA89ZX2TY8	TRV	COMPLD	0	
60790	06/04/20 12:57P	OA89ZX2TY8	TRV	COMPLD	0	
60789	06/04/20 12:57P	OA89ZX2TY8	TRV	COMPLD	0	

The following fields and buttons apply to the incoming message portion of the screen:

- The **Refresh** button will re-access the database to update the list of messages.
- The **Delete** button will delete the selected incoming message from the database.
- The **Delete All** button will delete all the incoming messages from the database.
- The **Limit** field controls the number of messages displayed in the list. By default, it is populated with the number specified in the System Admin task. You can modify the number on this screen by typing in the field provided and selecting the **Refresh** button.
- Checking the **Unsolicited** checkbox allows viewing of API requests to retrieve messages for which the API client timed out, i.e. messages in which the API client specified either a routeid or requestid to retrieve a response rather than generate a new request.

The following is the outgoing messages portion of the screen:

1 Outgoing		Limit 25	Refresh	Delete	DeleteAll
Seq #	Date/Time	Request ID	Request	User ID	IP Addr
530946	03/17/04 06:13P	OA03190A2E	Reserve	bso	10.3.0.11

The following fields and buttons apply to the outgoing message portion of the screen:

- The **Refresh** button will re-access the database to update the list of messages.
- The **Delete** button will delete the selected outgoing message from the database.
- The **Delete All** button will delete all the outgoing messages from the database.

- The **Limit** field controls the number of messages displayed in the list. By default, it is populated with the number specified in the System Admin task. You can modify the number on this screen by typing in the field provided and selecting the **Refresh** button.

To display the detail of either an incoming message or an outgoing message, click anywhere on the message. The detail will be displayed as shown in the following:

Seq # 530946	Date/Time 03/17/04 06:13P	Request ID OA03190A2E
Route ID	Term Rpt	Err Code 0

maxattempts~5;count~34;resporgList~ART01;contiguous~0;
cname~B OLSSON;cphone~7323566999;numList~1;nlname~thursday list

You can edit an incoming or outgoing API message by typing in the text field provided in the detail. The button will save any changes you have made.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [API Message Status Preferences](#) for details on customizing this screen.

This screen allows you to view the status of the links to Carrier Express. There will be one link shown for each Carrier Express platform with which this 8MS instance communicates.

1. In the menu frame, select the **CarExp Link Status** link located in the **Tools** section of the menu. The following will appear on the screen:

Carrier Express Link Status					
? ✕					
Server	State	# Msgs In	# Msgs Out	State Time	Tick Time
soacex08.carrierexpress.com	2	35	35	01/25/11 10:10:58	01/25/11 10:28:01
Refresh					

2. For each possible link the status as well as other information is provided.
 - If the background is **green**, then the link is established for use and is currently available.
 - If the background is **red**, then the link is established for use but is not currently available.
 - To re-query the database for the most current information, select the **Refresh** button.

This screen allows you to view the status of the current incoming and outgoing Carrier Express messages in the 8MS application. You can also delete or retry individual or sets of messages.

In the menu frame, select the **CarExp Msg Status** link located in the **Tools** section of the menu. The screen is divided into three sections: Incoming Messages, Outgoing Messages and a message detail display area.

The following is the Incoming Messages portion of the screen:

Msg ID	Route	Conf	Number	Date/Time	User ID
OA0042A04B	ACT	N		01/26/11 08:54A	
OA0042A04A	ACT	N		01/26/11 08:54A	

The following is the outgoing messages portion of the screen:

Msg ID	Route	Conf	Number	Date/Time	User ID
OA0042A04D	ACT	W	8556246207	01/26/11 08:54A	gaf
OA0042A04C	ACT	W	8556246204	01/26/11 08:54A	gaf
OA0042A04B	ACT	C	8556246206	01/26/11 08:53A	gaf
OA0042A04A	ACT	C	8556246204	01/26/11 08:53A	gaf

The following fields and buttons apply to both the incoming and outgoing message portions of the screen:

- The **Refresh** button will re-access the database to update the list of messages.
- The **Retry** button will try to resend one or more messages. If any of the status checkboxes have been checked, all messages matching the specified status values will be resent, otherwise the currently selected message (if there is one) will be resent.
- The **Delete** button will delete one or more messages. If any of the status checkboxes have been checked, all messages matching the specified status values will be deleted, otherwise the currently selected message (if there is one) will be deleted.
- The **Message Limit** field controls the number of messages displayed in the list. By default, it is populated with the number specified in the **Parameter Administration: Miscellaneous** screen. You can modify the number on this screen by typing in the field provided and selecting the **Refresh** button.

To display the detail of either an incoming message or an outgoing message, click anywhere on the message. The detail will be displayed as shown in the following:

Msg Id OA0042A04D	Priority 40	Conf W
Number 8556246207	Route ACT	User gaf
Time Stamp 01/26/11 08:54A	Request Id OA0042A04D	Resend Count 0
Time Sent 01/26/11 08:54A	Operation	
URL soacex08.carrierexpress.com		


```

<dn>8556246207</dn>
<clientdata>
  <id>OA0042A04D</id>
  <user>gaf</user>
  <company>compid 20, csf Corp</company>
  <host>ipaddr 192.80.23.60, 8mshost 8msgaf.csfcorp.com</host>
</clientdata>
<globalcrossing>
<modeldn>8556246206</modeldn>
<stationdigits>12</stationdigits>
  
```

Save Msg Text View Formatted

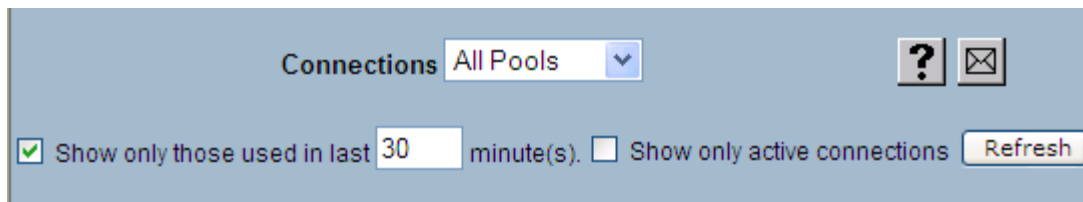
You can edit an incoming or outgoing API message by typing in the text field provided in the detail. The **Save Msg Text** button will save any changes you have made.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **SMS Message Status/Carrier Express Message Status Preferences** for details on customizing this screen.

This function allows you to view the current database connections for a specific company or for the global login pool. Initially, when logging in, you are given a connection to the database from the global login pool. Once you have successfully logged in and the company associated with your login has been identified, you are given a connection from your company's pool of connections.

To access this screen, select the **Connections** link located in the **Tools** section of the menu. The following will appear in the workspace frame:



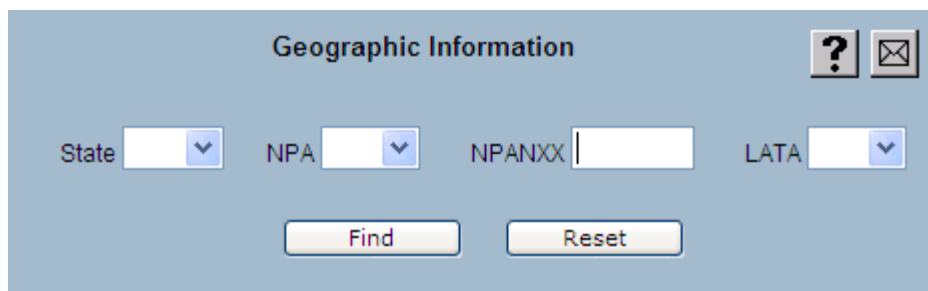
The screenshot shows a web interface for managing database connections. At the top, there is a label 'Connections' followed by a dropdown menu currently set to 'All Pools'. To the right of the dropdown are two icons: a question mark and a mail icon. Below the dropdown, there is a checkbox labeled 'Show only those used in last 30 minute(s)' which is currently checked. Next to it is another checkbox labeled 'Show only active connections' which is currently unchecked. To the right of these checkboxes is a 'Refresh' button.

Now select the **Connections** Pool you want to view. By default, all pools are selected. You may also limit the selections based on last used time, or you may select only active connections: When a pool is selected, the following will appear in the bottom frame:

Pool	CreateTime	LastUser	InUse?	UseCount	TimeLastUsed	Duration(ms)	
Global	03/17 16:01:27	null	N	2	03/17 18:19:18	13542	Recreate
Global	03/17 16:01:27	null	N	1	03/17 18:18:26	14388	Recreate
Global	03/17 16:01:28	[api8ms]	N	1	03/17 18:13:00	36	Recreate
csf	03/17 16:02:26	bso	N	43	03/17 18:13:29	18057	Recreate
csf	03/17 16:02:26	bso	N	49	03/17 18:21:35	71	Recreate

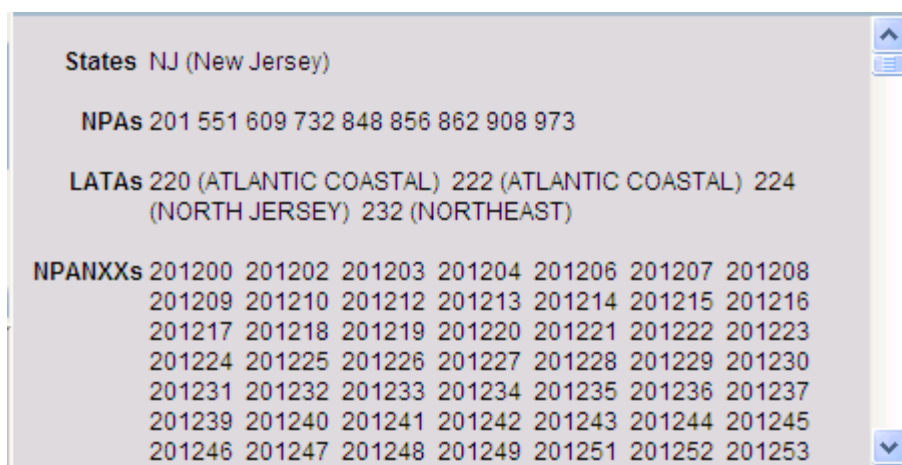
Selecting the **Recreate** button returns the database connection to the pool.

This function allows you to view information related to a geographic area.



The form is titled "Geographic Information" and includes a help icon (?) and a close icon (X) in the top right corner. It features four input fields: "State" (a dropdown menu), "NPA" (a dropdown menu), "NPANXX" (a text input field), and "LATA" (a dropdown menu). Below these fields are two buttons: "Find" and "Reset".

A single state, LATA, NPA or NPANXX may be queried. All resulting geographic information for that value will be shown in the bottom frame. An example of a result for the query "State=NJ" is shown here.



The results are displayed in a scrollable window. The title is "States NJ (New Jersey)". The results are organized into three sections: "NPAs", "LATAs", and "NPANXXs".

NPAs 201 551 609 732 848 856 862 908 973

LATAs 220 (ATLANTIC COASTAL) 222 (ATLANTIC COASTAL) 224 (NORTH JERSEY) 232 (NORTHEAST)

NPANXXs 201200 201202 201203 201204 201206 201207 201208 201209 201210 201212 201213 201214 201215 201216 201217 201218 201219 201220 201221 201222 201223 201224 201225 201226 201227 201228 201229 201230 201231 201232 201233 201234 201235 201236 201237 201239 201240 201241 201242 201243 201244 201245 201246 201247 201248 201249 201251 201252 201253

Geographic data is downloaded from SMS and is updated frequently.

This function allows you to view the status of the processes in the 8MS application. It also allows you to pause or terminate the processes if necessary.

To access this screen, select the **Process Control** link located in the **Tools** section of the menu. The following will appear in the workspace frame:

To change the current *Run Level*, choose the level from the **Run Level** drop-down list and select the **Change Run Level** button. This will cause any process whose run level is greater than the one selected to stop running.

In the lower frame, a list of the processes with their status and other information will appear as shown below.

Process	State	Type	Run Level	PID	Run Count	Run Time
apppipe	Running	respawn	1	24131	1	03/15/04 01:28A
runweb	Running	respawn	1	24132	1	03/15/04 01:28A
smstcp	Running	respawn	2	24133	1	03/15/04 01:28A
mpmanager	Running	respawn	3	26285	64	03/17/04 06:10P
mpworker1	Running	respawn	3	25948	4	03/17/04 02:52P
mpworker2	Running	respawn	3	25970	4	03/17/04 03:08P
mpworker3	Running	respawn	3	25969	4	03/17/04 03:08P
mpworker4	Running	respawn	3	25947	4	03/17/04 02:52P
mpworker5	Running	respawn	3	25946	4	03/17/04 02:52P
mpworkerR	Running	respawn	3	25959	2	03/17/04 03:04P
msgd	Running	respawn	3	26308	65	03/17/04 06:29P
cleanup	Running	respawn	4	25624	4	03/17/04 02:00A
batch	Running	respawn	5	26236	69	03/17/04 05:54P
sync	Running	respawn	6	25652	3	03/17/04 03:15A
outreq	Running	respawn	7	26164	2	03/17/04 04:47P
outrsp	Running	respawn	7	26162	1	03/17/04 04:42P
rs8ms	Running	respawn	7	24159	1	03/15/04 01:28A

The color in the **Process** column indicates the status of the process.

- **green** indicates the process is running
- **red** indicates the process has been stopped.
- **yellow** indicates the process has been paused.
- **grey** indicates this process has never been run.

To pause a running process or to resume a paused process, select the process name from the lower frame list. The following prompt window will appear.



Selecting the **OK** button will toggle the process state as indicated. To update the process status, select the **Refresh** button on the upper frame.

This function allows you to view, edit and enter SMS/800 Error Messages. For each Route ID, there is a set of error message numbers. To find an existing error message, you must enter both a Route ID and a message number. To add a new error message, you can add a new route ID and a new message number OR you can select an existing route ID and add a new message number. To access the **SMS Error Msgs** screen, select the **SMS Error Msgs** link located in the **Tools** section of the menu. The following will appear in the workspace frame:

Enter the Route ID:

- To enter an existing one, select the ID from the **Select a route ID** drop-down list.
- To add a new route ID, enter the ID in the **or enter a new one** text field.

Enter an error message number:

- To enter an existing one, select the message number from the **Select a message number** drop-down list. If an error message for the Route ID and the message number selected already exists, the error message text will populate in the field below.
- To add a new message number, enter the number in the **or enter a new one** text field.

In the **Message Text** text box provided, you can view/modify existing text or enter new text for the Route ID and Message Number selected. To save changes or to save a new error message, select the **Update** button.

To delete an error message, select the **Delete** button.

This function allows you to view the status of the TFNR links to SMS/800.

1. In the menu frame, select the **TFNR Link Status** link located in the **Tools** section of the menu. The following will appear on the screen:

User ID	State	Status Code #	Msgs In #	Msgs Out	State Time	Tick Time
ART35T01	3 (available)	200	27416	27416	07/06/21 08:34:35	07/06/21 08:34:35
ART35TFR	3 (available)	200	1393250	1394608	07/06/21 08:34:35	07/06/21 08:34:35
EPP01TST	2 (idle)		0	0	07/06/21 08:34:35	07/06/21 08:34:35
SMS/800	1 (unconfigured)	200	24622	0	07/06/21 08:34:35	07/06/21 08:34:35

Refresh

2. There is one link for each recent connection made on behalf of a company/TFNR User pair. For each link, the status as well as other information is provided.
 - If the background is **green**, then the link is currently in use.
 - If the background is **red**, then the link was used recently but is not currently active.
 - If the background is **yellow**, then the link is in use but Somos has throttled it because that link has exceeded a message threshold (i.e. a maximum number of messages has been exceeded).
 - If the background is **grey**, then the link has been configured in the TFNR communications process but has not yet connected to Somos.

For information on how to configure 8MS TFNR communications, see the [TFNR User Administration](#) screen.

3. To re-query the database for the most current information, select the Refresh button.

This function allows you to view the status of the current incoming and outgoing SMS/800 messages in the 8MS application. You can also resend messages.

In the menu frame, select the **SMS Msg Status** link located in the **Tools** section of the menu. The screen is divided into three sections: Incoming Messages, Outgoing Messages and a message detail display area.

The following is the Incoming Messages portion of the screen:

12 Incoming

Limit 25

☐ B (0)

☐ ~B (12)

Refresh

Retry

Delete

Msg ID	Route	CProc	RspFmt	Conf	Flow	Number	SMS Template	RespOrg	Date/Time	User ID
OA89ZX2TLW	TSR	TFNR	XML	N					06/08/20 10:40A	
OA89ZX2TLX	TSR	TFNR	XML	N					06/08/20 10:40A	
OA89ZX2TLY	TSR	TFNR	XML	N					06/08/20 10:40A	
OA89ZX2TLZ	TSR	TFNR	XML	N					06/08/20 10:40A	
OA89ZX2TM0	TSR	TFNR	XML	N					06/08/20 10:40A	
OA89ZX2TM1	TSR	TFNR	XML	N					06/08/20 10:39A	

The following is the outgoing messages portion of the screen:

16 Outgoing		Limit	25	☐ a (0)	☐ B (4)	☐ C (12)	☐ W (0)	Refresh	Retry	Delete
Msg ID	Route	CProc	RspFmt	Conf	Flow	Number	SMS Template	RespOrg	Date/Time	User ID
OA89ZX2TLW	TSR	TFNR	XML	C	0	8005551212		ART19	06/08/20 10:40A	gaf
OA89ZX2TLX	TSR	TFNR	XML	C	0	800SYNCART		ART19	06/08/20 10:40A	gaf
OA89ZX2TLY	TSR	TFNR	XML	C	0	8556785504		ART19	06/08/20 10:40A	gaf
OA89ZX2TLZ	TSR	TFNR	XML	C	0	8556785503		ART19	06/08/20 10:40A	gaf
OA89ZX2TM0	TSR	TFNR	XML	C	0	8556785502		ART19	06/08/20 10:40A	gaf
OA89ZX2TM1	TSR	TFNR	XML	C	0	8556785501		ART19	06/08/20 10:39A	gaf
OA89ZX2TM6	TRQ	TFNR		C	0		*AR-API-0012	ART19	06/08/20 10:39A	gaf

The following fields and buttons apply to both the incoming and outgoing message portions of the screen:

- The **Refresh** button will re-access the database to update the list of messages.
- The **Retry** button will try to resend one or more messages. If any of the status checkboxes have been checked, all messages matching the specified status values will be resent, otherwise the currently selected message (if there is one) will be resent.
- The **Delete** button will delete one or more messages. If any of the status checkboxes have been checked, all messages matching the specified status values will be deleted, otherwise the currently selected message (if there is one) will be deleted.
- The **Limit** field controls the number of messages displayed in the list. By default, it is populated with the number specified in the **Parameter Administration: Miscellaneous** screen. You can modify the number on this screen by typing in the field provided and selecting the **Refresh** button.

To display the detail of either an incoming message or an outgoing message, click anywhere on the message. The detail will be displayed as shown in the following:

Msg Id OA89ZX2TM4	CommProc TFNR	Method	Flow
Number	Route TRQ	User	Priority null
Time Stamp 06/08/20 10:39A	Resp Org	ED/ET	Channel null
Time Sent	Rsp Fmt	Conf N	Trace
Plan Name	Async Id OA89ZX2TM4	Resend Count	
Request Id	Operation	SMS Template	

```
{ "recVersionId": "1588627815264000000", "lockStatus": "N", "lstEffDtTms": [ { "custRecCompPart": "TAD", "custRecStat": "ACTIVE", "actionCode": "C", "apprStat": "NOT REQUIRED", "effDtTm": "2020-05-05T09:30Z" } ], "perms": "View", "ctrlRespOrgId": "ART34" }
```

You can edit an incoming or outgoing API message by typing in the text field provided in the detail. The button will save any changes you have made.

Customization

There are preferences that may be set to change the behavior of this screen. Refer to [Customizing 8MS](#) for how to set **User** and **Company Preferences** and see [SMS Message Status/Carrier Express Message Status Preferences](#) for details on customizing this screen.

The 8MS user interface has many common functions and graphical objects that appear on the various screens. This section of the 8MS User Guide describes those common functions and objects.

Shortcuts Shortcuts provide a quick way to execute common queries and actions.

Choice Lists Drop-down lists of items, such as Number Lists, Routing Sets, and Templates, provide an easy way to filter data, and are customizable.

Batches Batches provide the ability to perform an action on many numbers.

Data Lists Results from search screens provide lists of data which have common attributes and behaviors. Learn how to make the most of these lists.

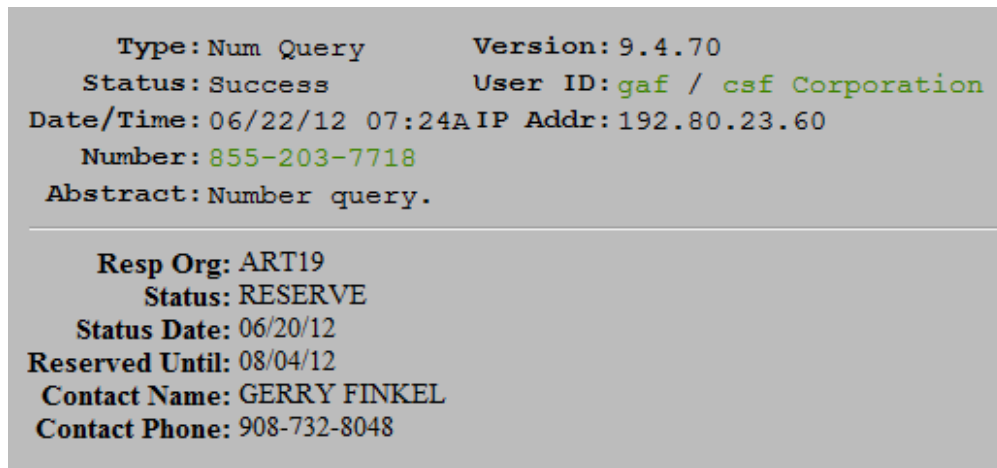
Toolbar The toolbar, located on the upper right of all screens, provides several tools related to the screen you are currently viewing.

Customizing 8MS The 8MS user interface is customizable. This section explains how to set Company and User Preferences. All Preferences and descriptions are listed.

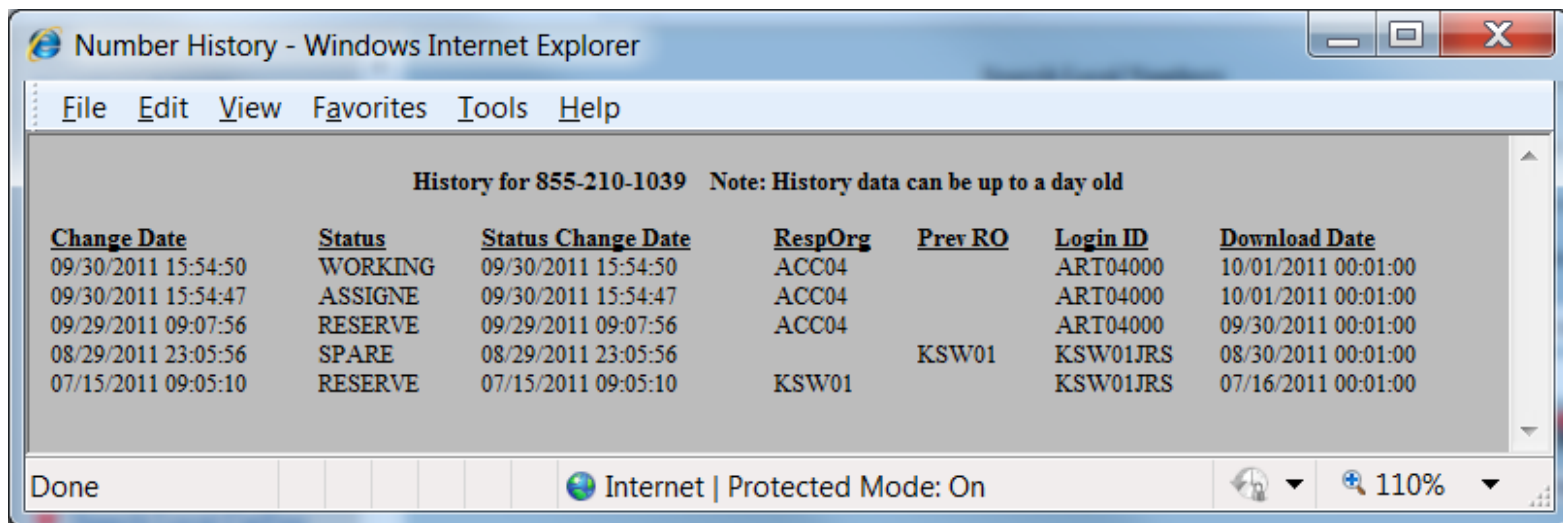
Release 9.4 aims to improve 8MS work flow by adding Shortcuts that allow users to perform actions, previously restricted to a single screen, without leaving their current screen.

Number History

On some screens the toll-free number is presented in a list of records or the detail of a single record is a hyperlink. For example, the **Activity Log** detail shows the **Number:** field as a hyperlink.



Clicking on this link executes a number history request and shows the results in a pop-up window.



In some cases the number may not be a hyperlink, as in **Record Management: SMS/800 CAD**, where it is a text field. In that case, select the **H** button to see the history pop-up.

Toll Free Number/8MS Routing Set/SMS Template PDF Report

Another shortcut available on many screens, is the **Toll Free Number/8MS Routing Set Report** link. This shortcut is available from the **Search Local Numbers**, **Search Local Records**, and **Search Local Templates** screens. For example, the **Search Local Records** results list (below) has the **8MS Routing Set/SMS Template** column as a hyperlink for each item in that column.

Show Numbers Only

Records per Page

15

Set

Revert

Hide Filters

Record(s): 1 to 15 of 664

Page 1

2

3

4

5

6

7

8

of 45

Next 15

Last

	Toll Free #	Date/Time	Status	Resporg	CPR?	8MS Routing Set/ SMS Template	AOS
SCP	855-203-7718	07/05/12 08:45A	Old	ART19	No	Beta 2	US
SCP	855-203-7718	07/05/12 10:00A	Disconnected	ART19	No		US
SCP	855-210-1039	05/08/12 01:30P	Active	ART19	Yes	Beta 1	US
SCP	855-229-2260	05/20/12 08:00A	Active	ART19	No	Alpha 1	US
SCP	855-229-2261	04/13/12 08:00A	Active	ART19	Yes	Beta 1	US
SCP	855-229-2263	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-229-2264	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-229-2266	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-229-2267	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US

Clicking on any of these links will generate a PDF report for the specified 8MS Routing Set or SMS Template. The **Number History** shortcut for each number is shown in the **Toll Free #** column.

Shortcut Menus

Certain data items have a **Shortcut Menu** identifiable by its light-green color. The **Search Local Records** screen (above) has Shortcut Menus on the fields **Toll Free #**, **Resporg**, and **8MS Routing Set/SMS Template**. Clicking on a shortcut data item will cause the Shortcut Menu to appear. Below is the Shortcut Menu for a Toll-Free Number on the **Search Local Records** screen.

Show Numbers Only

Records per Page

15

Set

Revert

Hide Filters

Record(s): 1 to 15 of 665

Page

1

2

3

4

5

6

7

8

of 45

Next 15

Last

Toll Free #: 855-210-1039

Activity Log

Number History

Query

Retrieve

Search Local Number

Search Local Record

Trouble Referral Query

View PDF Report

Time	Status	Resporg	CPR?	8MS Routing Set/ SMS Template	AOS
/12 01:30P	Active	ART19	Yes	000000463	US
/12 08:00A	Active	ART19	No	000000502	US
/12 08:00A	Active	ART19	Yes	000000463	US
/11 08:00A	Active	ART19	--	*AR-GAF-01	US
/11 08:00A	Active	ART19	--	*AR-GAF-01	US
/11 08:00A	Active	ART19	--	*AR-GAF-01	US

Note that the Shortcut Menu contains a title indicating the type of menu (Toll Free #) and the value (855-210-1039) that was selected. This acts as a reminder of what item was selected, since the item itself would normally be covered by the menu.

Below is a list of data items that may have a Shortcut Menu, the shortcuts available for that data item, and on what screens that shortcut may be found for that data item.

Toll-Free Number

The Toll-Free Number Shortcut Menu may contain the following shortcuts: **Activity Log** (detail frame), **Number History**, **Query**, **Retrieve**, **Search Local Numbers**, **Search Local Records**, and **Trouble Referral Query**.

The Toll-Free Number Shortcut Menu will appear for any toll-free number on the following screens: **Activity Log** (detail frame), **Batch Log** (detail frame), **Search Local CarExp**, **Search Local Numbers**, **Search Local Records**, and **Search Local Templates**.

8MS Routing Set

The 8MS Routing Set Shortcut Menu may contain the following shortcuts: **Search Local Numbers**, **Search Local Records**, and **View PDF Report**.

The 8MS Routing Set Shortcut Menu will appear for any 8MS Routing Set on the following screens: **Search Local Numbers** and **Search Local Records**.

SMS Template

The SMS Template Shortcut Menu may contain the following shortcuts: **Activity Log** (detail frame), **Retrieve Template**, **Search Local Numbers**, **Search Local Records**, **Search Local Templates**, and **View PDF Report**.

The SMS Template Shortcut Menu will appear for any SMS Template on the following screens: **Search Local Numbers**, **Search Local Records**, and **Search Local Templates**.

Resp Org

The Resp Org Shortcut Menu may contain the following shortcuts: **SMS/800 Change Contact** (detail frame), **SMS/800 Primary Contact**, and **Trouble Referral Query**.

The Resp Org Shortcut Menu will appear for any Resp Org on the following screens: **Search Local CarExp**, **Search Local Numbers**, **Search Local Records**, and **Search Local Templates**.

User

The User Shortcut Menu may contain the following shortcuts: **Activity Log** (detail frame), **Company Info**, and **User Info**.

The User Shortcut Menu will appear for any User on the following screens: **Activity Log** (detail frame) and **Batch Log** (summary frame).

Company

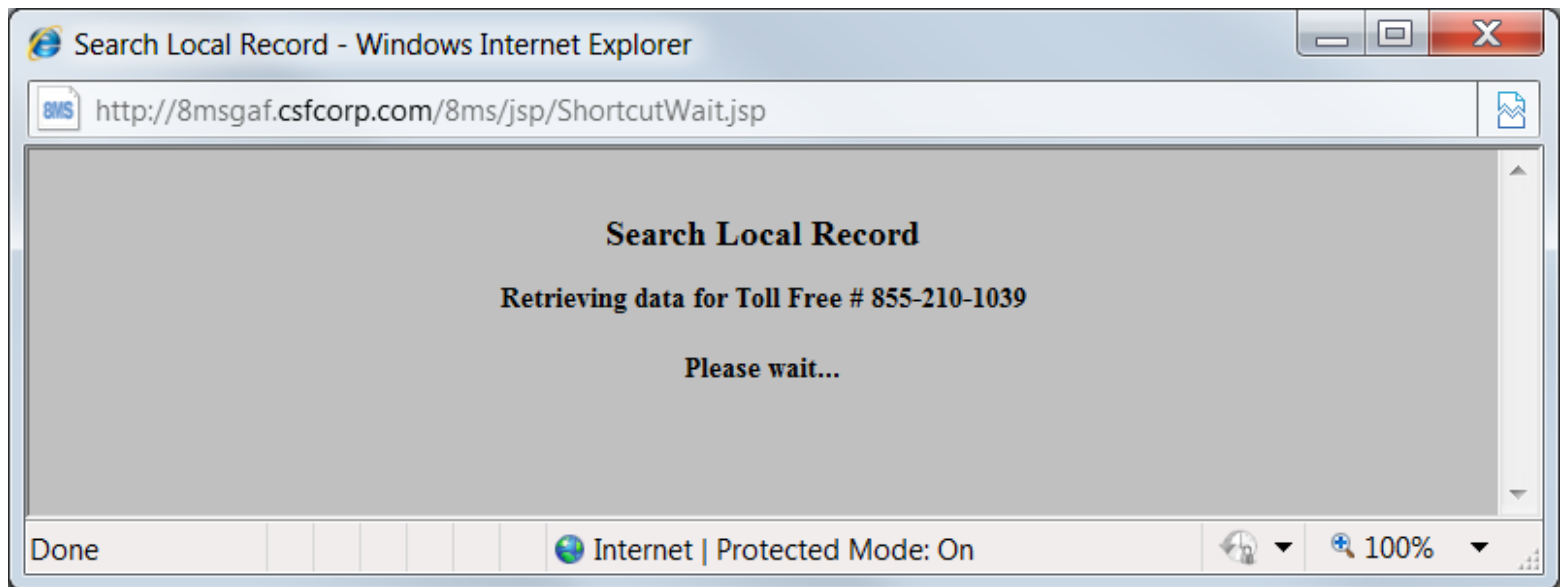
The Company Shortcut Menu may contain the shortcut **Company Info**.

The Company Shortcut Menu will appear for any Company on the **Activity Log** (detail frame) screen.

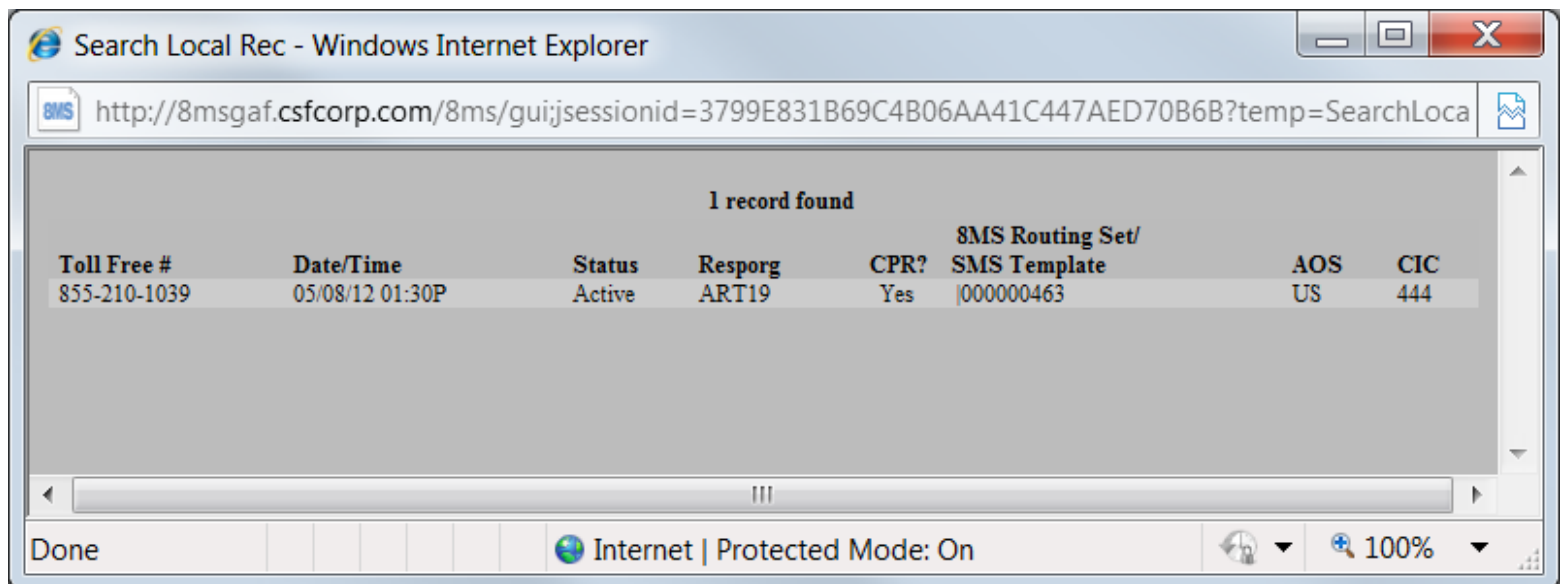


If you do not have access to a particular screen then you will also not have access to the shortcut equivalent for that screen. For example, if you do not have access to the **Trouble Number Query** screen, then you will not have access to the shortcut for that screen on any **Toll Free Number** or **Resp Org**.

A shortcut on a Shortcut Menu behaves just like a shortcut on a data item. When a shortcut is selected, a pop-up window appears indicating that the request has been generated. Below is an example of a **Search Local Records** request.



The response is displayed in the same pop-up window. Below is an example of **Search Local Records** response.



If an action would normally generate an **Activity Log** entry, then the shortcut equivalent will also generate an entry. For example, performing a **Retrieve** would normally cause an activity to be logged, so the shortcut version will also cause an activity to be logged. Since performing any **Search Local** query will not generate an activity log entry, an entry will not be generated for the shortcut.

Whether or not shortcuts menus appear for a user is determined by the **Shortcuts** User Preference. The colors used to indicate that shortcuts are available for an item are determined by the **ShortcutsColors** User Preference. Refer to the **User Prefs** section of the user guide for details on setting preferences and see the **User Interface** section of **Customizing 8MS** for information on the **Shortcuts** and **ShortcutsColors** User Preferences.

Many 8MS screens provide data in the form of Choice Lists. These lists are used for several different purposes:

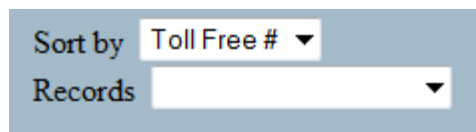
- for filtering on Search screens such as [Search Local Numbers](#), [Search Local Records](#), [Search Local Templates](#), and [Activity Log](#).
- for populating existing records into screens such as [Record Management: SMS/800 CAD](#), [Record Management: SMS/800 PAD](#), and [SMS Template Management](#).
- for creating [Batches](#) on screens such as [Query](#), [Retrieve](#), and [Copy Record](#).

There are various choice lists available on many screens. Most of these lists are simple, non-configurable lists such as the **Type** and **Status** filter lists on the [Activity Log](#) screen



A screenshot of a web interface showing two dropdown menus. The first menu is labeled 'Type' and has 'All' selected. The second menu is labeled 'Status' and also has 'All' selected. Both menus have a downward arrow on the right side.

or the **Sort by** record order list and **Records** filter list on the [Search Local Records](#) screen.



A screenshot of a web interface showing two dropdown menus. The first menu is labeled 'Sort by' and has 'Toll Free #' selected. The second menu is labeled 'Records' and is empty. Both menus have a downward arrow on the right side.

Several 8MS Choice Lists are customizable via a set of Company/User Preferences and provide additional features. These lists include:

Toll-Free Numbers	Toll Free Number 
SMS Templates	SMS Template  
8MS Routing Sets	8MS Routing Set  
Number Lists	Number List  
Portal Clients	Portal Client  

Initially, each list is limited to a small set of recently used items. The number of recently used items is determined by a **RecentCount** Preference (the actual preference names are shown below) and may be modified by you.

The 8MS user interface remembers your most recently used Toll-Free Numbers, Number Lists, SMS Templates and 8MS Routing Sets. Whenever a Toll-Free Number, Number List, SMS Template or 8MS Routing Set is referenced (i.e., selected or created) on any of the 8MS screens, the item is added to its appropriate most recently used list. The newest most recently used item is at the top of the list while the oldest recently used item is shown at the bottom.

Note that recently used lists are only maintained for



the current session; when you log out of 8MS these lists are discarded.

You may add a set of favorite items to this list by setting the **MyFavorites** preference. The items stored in this preference will appear above the most recently used items, in the order they appear in the preference.

To the right of each drop-down list is a button that allows you to modify what items appear in the drop-down list. Selecting this button will populate the choice list with all possible values for that choice list. Items in the list will then be sorted alpha-numerically. Selecting the button again will return the view back to the most recently used and favorites.

This button may be colored red, green, blue or cyan. Red is associated with Number Lists, green with SMS Templates, blue with 8MS Routing Sets and cyan with Portal Clients. The button's appearance changes based on the current set of items displayed in the list. The possible appearances are:

- favorites and most recently used:  favorites are shown first, then most recently used in order of use
 - SMS Templates: also includes recently retrieved SMS Templates
- all items owned by your company:  sorted alpha-numerically
- special filtering based on the type of list: 
 - Number Lists: all items created by the user, sorted alpha-numerically
 - SMS Templates: all templates except **BR Templates** with no numbers assigned to them.

You may select the button repeatedly to toggle through the various sets of choices.



When the **Show All** button is selected, items are sorted alpha-numerically. The most recently used and favorite items will **not** be shown at the top of the list but will appear sorted in the appropriate position in the list.

When an item in a choice list is selected, a count will appear to the right of the choice list. This count indicates the number of Toll-Free numbers associated with this item. If your data contains a large number of Toll-Free numbers (e.g., you have hundreds of thousands of Toll-Free Numbers active in a particular 8MS Routing Set or pointing at a particular SMS Template), calculating this count may be slow. Retrieving the count of numbers may be disabled by setting the **ShowNumberCount** preference (actual preference names are shown below) to 0. When this preference has been disabled, a link will appear to the right of the **Show All** button, in place of the count, as shown below for the **Search Local Records** screen.

8MS Routing Set  #'s

Selecting this link will then perform the count calculation. This gives you control over whether or not you see the count for a particular item on a choice list.

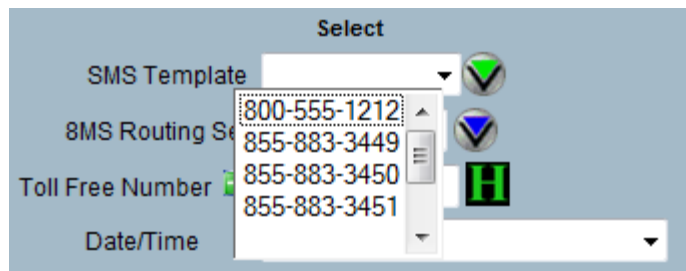
The table below shows each data item and the associated Company/User preferences.

Item	RecentCount	MyFavorites	ShowNumberCount

SMS Template	RecentSmsTemplateCount	MySmsTemplates	ShowSmsTemplateNumberCount
8MS Routing Set	RecentRoutingSetCount	MyRoutingSets	ShowRoutingSetNumberCount
Number List	RecentNumberListCount	MyNumberLists	ShowNumberListNumberCount
Portal Client	RecentPortalClientCount	MyPortalClients	ShowPortalClientNumberCount
Toll-Free Number	RecentNumberCount		

While SMS Templates, 8MS Routing Sets, and Number Lists are normal drop-down lists, Toll-Free Numbers are typically typed into a text field rather than selected from a drop-down list. To select a recently used toll-free number click the small arrow  that appears between the text field and its label:

Toll Free Number  . Clicking on this image causes a pop-up to appear.



Selecting a toll-free number from this list causes the toll-free number to populate the associated text field.

Dynamic List of Numbers

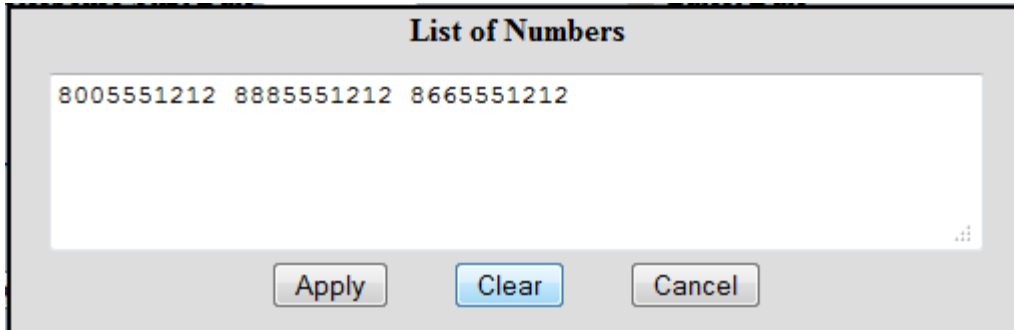
One of the strengths of 8MS lies in the ability to create a **Number List**, a set of numbers with an associated name. This is a convenient way to work with a set of numbers without having to constantly copy and paste that set of numbers; instead, the Number List name is selected. However, in order to use a Number List it is necessary to first create that Number List. Since a Number List tends to be used for multiple actions (that is, referenced in multiple screens), this is not a serious problem.

There are times, however, when a list of numbers is needed for a single task and that list will never again be used. Rather than spending time creating a Number List, you just want to specify the set of numbers on the screen you are currently viewing. To allow for this case, it is possible to create a **Dynamic List of Numbers**, a set of numbers without an associated name. A Dynamic List of Numbers can be created in one of two ways. The first way is by pasting or typing directly onto the **Numbers** text area, as shown here.

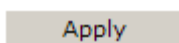
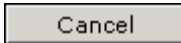
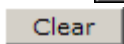
The **Numbers** text area appears on screens such as **Copy Record** as well as on the Batch popups, as

described in the **Batches** section.

In some cases a screen has so many search fields that it is difficult to put a **Numbers** text area on the screen. The three Search Local screens **Search Local Numbers**, **Search Local Records** and **Search Local Carrier Express**, all fit this category. In those cases, a  button appears in place of the **Numbers** text area. Selecting this button will cause a popup to appear, as shown below.



The image shows a popup window titled "List of Numbers". It contains a text area with the following numbers: 8005551212 8885551212 8665551212. At the bottom of the popup are three buttons: "Apply", "Clear", and "Cancel".

Numbers may be either typed or pasted into this popup. Selecting the  button will store the set of numbers as if you had entered them directly on the screen and the popup will be dismissed. When an action such as a **Retrieve** or **Retrieve All** is executed, the set of numbers entered in the popup will be applied as part of the filter. Selecting the  button will dismiss the popup without changing the current set of numbers. Selecting the  button will clear the text area of any numbers. Note that you must click on the **Apply** button to make the clear take effect. Canceling the popup by clicking on the **Cancel** button after clearing your list will cancel your clear action. If you do this, the previous set of numbers (those shown prior to clicking on **Clear**) will then be left as part of your filter.

One advantage screens that have the **Numbers** text area has is that the set of numbers entered can be seen. Since screens that have the  button cannot show the set of numbers specified without bringing up the popup, to the right of the button there will be a number indicating how many numbers have been entered into the popup. This is used to provide some feedback that you have numbers specified as part of your filter.



The image shows a search bar with the text "Number List" and a dropdown arrow. To the right of the dropdown is a red button with a white "V" and a "or" text. To the right of the "or" is a  button followed by the text "3 #'s".

Be aware that only one of **Number List** or **Dynamic List of Numbers** may be used for a search.



Selecting a **Number List** will clear out the **Dynamic List of Numbers**; setting numbers in the **Dynamic List of Numbers** popup will clear out the selected **Number List**.

If the Dynamic List of Numbers popup has been cleared and applied then no count will be shown to the right of the button. If a Number List has been selected then the Dynamic List of Numbers is also cleared and no count will be shown.

Most operations that can be done for a single number can also be done on an arbitrary set of numbers. For example, activating 500 numbers is almost as easy as activating one number. Operations using sets of numbers are called *batch operations*. Selecting a set of numbers for a batch is done by specifying one of the following as the target of the batch:

Number List	All Toll-Free Numbers in this Number List
Dynamic List of Numbers	All Toll-Free Numbers listed in a user interface text box
8MS Routing Set	All Toll-Free Numbers that are Active in this 8MS Routing Set
SMS Template	All Toll-Free Numbers whose Active record points at this SMS Template

In most cases, batch operations are requested using a different button than a single number operation. Most screens have a **Send** button for single-number requests, and a **Send Batch** button for batch requests. Selecting **Send Batch** will result in a pop-up window that allows a target (as shown in the table above) to be selected. A typical example of a batch pop-up, shown below, is the **Query Batch Popup**.

The set of numbers for a batch, as shown in the screenshot above, may be specified in one of 4 ways:

Field	Description
Number List	Select from a list of existing Number Lists. A Number List contains a previously defined list of Toll-Free Numbers. See Number List for details.
Numbers	Type or paste one or more Toll-Free Numbers, separated by a space or a newline. A set of numbers typed or pasted into a text box is known as a Dynamic List of Numbers .
SMS Template	Select from a list of existing SMS Templates. All Active Toll-Free Numbers pointing at the given SMS Template will be selected.
8MS Routing Set	Select from a list of existing 8MS Routing Sets. All Active Toll-Free Numbers in the given 8MS Routing Set be selected.
Max Msgs per Hour	Limit the number of messages per hour that may be sent to SMS/800. This is intended to help you avoid exceeding the per Resp Org CPU percent allocation defined by SMS/800.
	 The Max Msgs per Hour field may be given a per-User or per-Company default. Refer to Customizing 8MS for how to set User and Company Preferences and see MaxMsgsPerHour under User Interface Preferences for details on customizing this field.
Comments	Enter optional notes that will appear in the Batch Log .
Run Date/Time	Used to specify the date and time when the batch will be sent. If left blank, the batch job will run as soon as possible.

It is possible to hide the **SMS Template** and **8MS Routing Set** drop-down list from users when creating Disconnect Batches for CAD and PAD. This is done by setting the Company preference *DiscBatchHasRsSt* to 0. This impacts the **Batch Popup** for the following screens:

- **Disconect: SMS/800**
- **Record Management: CAD**
- **Record Management: PAD**

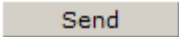


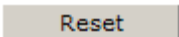
Setting this preference to 0 hides these drop-down lists, reducing the chance that a user may accidentally disconnects a large set of toll-free numbers by selecting an 8MS Routing Set or SMS Template with a large set of toll-free numbers associated with it.

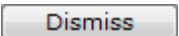
Note that **Record Management: CAD** and **Record Management: PAD** will only hide the two lists if the *End Intercept Date* has been set, since setting *End Intercept Date* sends a disconnect request to Somos.



For information on behavior, restrictions, and customization of the **Number List**, **SMS Template** and **8MS Routing Set** drop-down lists, see the **Choice Lists** section.

Select the  button. The batch operation will be initiated and the Batch Popup is closed. Results of batch operations will appear on the **Activity Log** and **Batch Log** screens.

Select the  button to reset the Batch popup screen to it's original state, as it was when it first appeared.

Select the  button to dismiss the Batch popup, which cancels the send batch request.

The results of batch operations are not returned in real-time. To monitor the progress of batch operations, use the **Batch Log** in the **System Activity** section. Additional information about a batch can be seen in the **Activity Log**, also in the **System Activity** section.

Many 8MS screens provide the ability to search for data. The results of such searches are typically presented as scrolling lists of data. The image below is a screenshot from the **Search Local Records** screen. Note the top portion of the screen is highlighted in red. The highlighted section contains all of the common features that are designed to assist in analyzing, managing, and sorting the search results.

Show Numbers Only		Records per Page 15		Set	Revert	Show Filters	
First	Previous 15	Record(s): 16 to 30 of 665		Page 1 2 3 4 5 6 7 8 of 45		Next 15	Last
Toll Free #	Date/Time	Status	Resporg	CPR?	8MS Routing Set/ SMS Template		AOS
SCP 855-231-0570	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01		US
SCP 855-231-0571	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01		US
SCP 855-231-0572	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01		US
SCP 855-231-0573	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01		US
SCP 855-231-0574	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01		US
SCP 855-231-0575	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01		US
SCP 855-240-2321	03/29/12 01:30P	Active	ART19	Yes	000000463		US
SCP 855-258-1047	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01		US
SCP 855-279-7344	11/09/11 07:15A	Sending	ART30	--	*AR-TMPL-05		US
SCP 855-279-7345	11/09/11 07:15A	Sending	ART30	--	*AR-TMPL-05		US
SCP 855-279-7346	11/09/11 07:15A	Sending	ART30	--	*AR-TMPL-05		US
SCP 855-279-7347	11/09/11 07:15A	Sending	ART30	--	*AR-TMPL-05		US
SCP 855-279-7348	11/09/11 07:15A	Sending	ART30	--	*AR-TMPL-05		US
SCP 855-279-7349	11/09/11 07:15A	Sending	ART30	--	*AR-TMPL-05		US
SCP 855-279-7350	11/09/11 07:15A	Sending	ART30	--	*AR-TMPL-05		US

These features are described below.

Show Numbers Only/Show All Fields

Selecting the hyperlink labeled **Show Numbers Only** will change the lower frame from a list of details to a simple, text-only list of numbers, allowing the set of numbers to be easily selected, copied and then pasted wherever you wish.

Show All Fields

Records per Page

15

Set

Revert

Show Filters

Record(s): 1 to 15 of 665

Page 1

2

3

4

5

6

7

8

of 45

Next 15

Last

8552101039

8552292260

8552292261

8552292263

8552292264

8552292266

8552292267

8552292268

8552292269

8552292270

8552292272

8552310566

8552310567

8552310568

8552310569

Note that the **Show Numbers Only** link has changed to **Show All Fields**. Selecting the **Show All Fields** link will return the frame back to the normal detailed view.

This link will only appear on screens that contain data related to toll-free numbers, including: **Search Local Numbers** and **Search Local Records** but will **not** appear on **Search Local Templates** or **Activity Log**.

Show Filters/Hide Filters

When viewing 8MS on a smaller monitor, a user may decide to view more records rather than the filtering features. For example, consider the following screenshot of **Search Local Records**.

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8MS						
Show Numbers Only		Records per Page 15		Set	Revert	Show Filters
Record(s): 1 to 15 of 665		Page 1 2 3 4 5 6 7 8 of 45		Next 15 Last		
Toll Free #	Date/Time	Status	Resporg	CPR?	SMS Routing Set/ SMS Template	AOS
SCP 855-210-1039	05/08/12 01:30P	Active	ART19	Yes	000000463	US
SCP 855-229-2260	05/20/12 08:00A	Active	ART19	No	000000502	US
SCP 855-229-2261	04/13/12 08:00A	Active	ART19	Yes	000000463	US
SCP 855-229-2263	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-229-2264	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-229-2266	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-229-2267	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-229-2268	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-229-2269	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-229-2270	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-229-2272	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-231-0566	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-231-0567	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-231-0568	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP 855-231-0569	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US

Note that the **Hide Filters** link has changed to **Show Filters**. Selecting the **Show Filters** link will restore the filtering area.

Navigating Pages of Data

Each of the Search screens provides at least two ways of viewing a list of data.

The **Retrieve All** button retrieves all records matching the search criteria and immediately displays all the records. Using this function allows users to view all of their records on a single page; however, depending on the number of records found, the retrieval may be slow.

The **Retrieve** button retrieves all records matching the search criteria but only displays one page of the data. Where applicable, there are user preferences that define how many records are displayed on a single page. (See **Customizing 8MS** to view the user preferences for each screen. See the user guide page for each particular screen for a link to user preferences for that screen, under the section **Customization**.) Using the **Retrieve** button will retrieve records more quickly than **Retrieve All**; however, not all data will be displayed on a single page.

If a **Retrieve** search yields more records than specified in the records-per-page user preference, then a series of links and a text field are displayed for navigating between pages.

Show Numbers Only		Records per Page 15		Set	Revert	Hide Filters
First	Previous 15	Record(s): 16 to 30 of 665		Page 1 2 3 4 5 6 7 8 of 45		Next 15 Last

Field	Description
Records per Page	Shows the current user preference value for this screen. To change the

number of records shown per page, enter the new value and select the **Set** link to the right of the text field or press **Enter**. To change the records per page value back to the user preference, select the **Revert** link. Whenever the **Set** or **Revert** function is used, the screen jumps back to the first page of data.

- First** Selecting this link shows the first page of the set. This link will not be available when viewing the first page.
- Previous X** Selecting this link shows the previous page, relative to the current page being viewed. The value for X will be the current value of the **Records per Page** text field. This link will not be available when viewing the first page.
- Next X** Selecting this link shows the next page, relative to the current page being viewed. The value for X will be the current value of the **Records per Page** text field. This link will not be available when viewing the last page.
- Last** Selecting this link shows the last page of the set. This link will not be available when viewing the last page.
- Page X of Y** Selecting a specific page number link from this list will display the corresponding page. The system attempts to show a range of 3 to 4 pages surrounding the current page, allowing the user to navigate to a page near the current one. Finally, in addition to showing what page you are currently viewing, to the left of the page range is a read-only field showing the current set of records you are viewing.

Row Striping

To make individual rows in lists of data easier to view, odd and even rows are shown in different shades of grey, making it visually easier to track data for a single row across all columns of that row. See below for an example of row striping, from the **Search Local Records** screen.

	Toll Free #	Date/Time	Status	Resporg	CPR?	8MS Routing Set/ SMS Template	AOS
SCP	855-231-0570	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-231-0571	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-231-0572	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-231-0573	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-231-0574	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-231-0575	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US

The colors used to stripe odd and even rows are controlled by a single Company/User Preference called *RowStripeColors*. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **RowStripping** for details on customizing row striping.

Current Row Highlighting

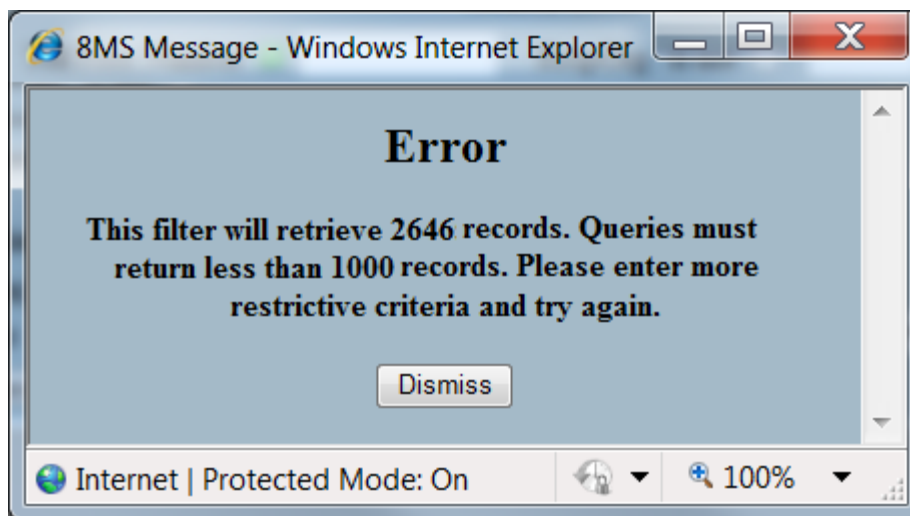
When the mouse floats over a particular row, that row is highlighted in a different color, to emphasize the current row (as shown below).

	Toll Free #	Date/Time	Status	Resporg	CPR?	8MS Routing Set/ SMS Template	AOS
SCP	855-210-1039	05/08/12 01:30P	Active	ART19	Yes	000000463	US
SCP	855-229-2260	05/20/12 08:00A	Active	ART19	No	000000502	US
SCP	855-229-2261	04/13/12 08:00A	Active	ART19	Yes	000000463	US
SCP	855-229-2263	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-229-2264	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-229-2266	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US
SCP	855-229-2267	12/13/11 08:00A	Active	ART19	--	*AR-GAF-01	US

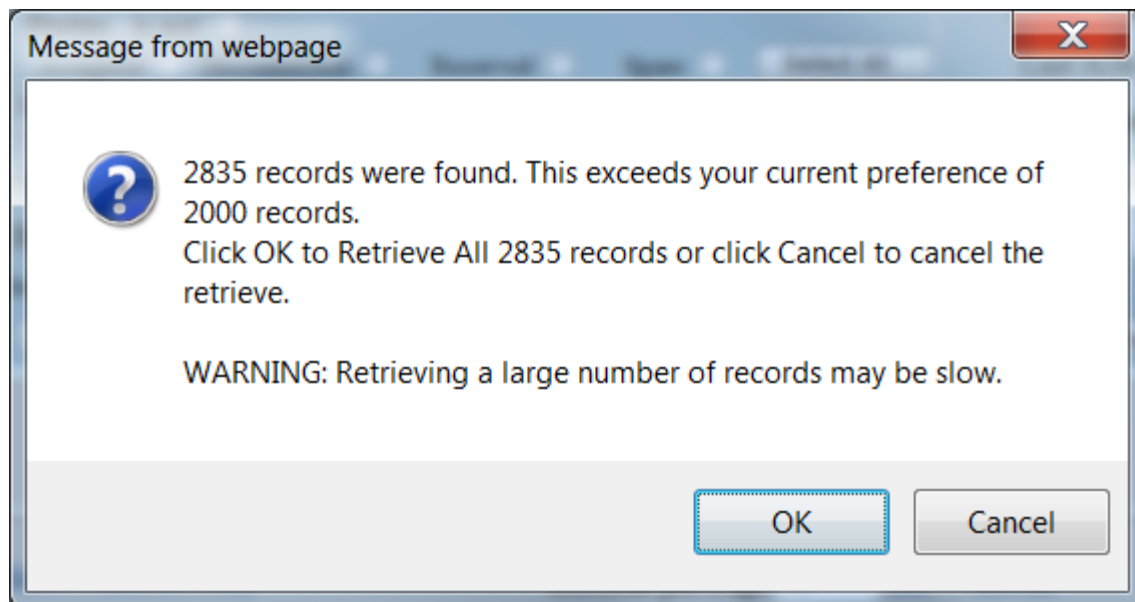
The colors used to highlight the current row, are controlled by a single Company/User Preference called *RowHighlightColors*. Refer to **Customizing 8MS** for how to set **User** and **Company Preferences** and see **RowHighlightColors** for details on customizing current row highlighting.

Overriding Maximum Retrieve

Each Search screen has a *MaxRetrieve* User Preference associated with it. This preference sets a maximum number of records allowed to be retrieved when performing a search. This is done in an attempt to avoid running a search that will take several minutes to execute and display. Prior to release 9.4, if a search resulted in more records than the *MaxRetrieve* preference, a message would appear stating that the search could not be performed.

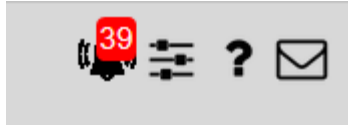


Users then had 2 options; they could modify the *MaxRetrieve* preference or they could provide more restrictive filters. As of release 9.4, this message has been changed to allow users to override the preference for this single query.



Selecting the **OK** button will execute the query; selecting the **Cancel** button will cancel the query. If the query is cancelled, The user then has the option to provide more restrictive filters.

Most 8MS screens contain a toolbar located on the upper right of the screen. The toolbar contains 2 functions that are associated with individual screens plus an email support link. The toolbar appears as shown.



Unread Notification Alerts

The left-most button on the toolbar is the **Unread Notification Alerts** link: . The count shown in the red box mapped over the image (as shown above) indicates the number of unread *Login* notification messages. Selecting this link will jump you to the **Notification Alerts** screen and will show you these unread messages. If there are no unread *Login* notification messages, the icon will instead be .

Per-Screen User Preferences

The next button to the right on the toolbar is the **Per-Screen User Preferences** link: . Selecting this link will bring up a **User Preferences** popup containing only those User Preferences that are related to this screen. This provides a fast, easy way to change the behavior of the screen currently being viewed.



Note that common preferences, those preferences that are related to multiple screens, are not shown on this popup for each individual screen. Instead, these preferences are accessible from the normal **User Preferences** screen, along with all other preferences. As an easy way to view just the common preferences without seeing other preferences, select the **Per-Screen User Preferences** toolbar button on the **User Preferences** screen.

For more information on Per-Screen Preferences, see **Per-Screen User Preferences** on the **User Preferences** page of the User Guide

Screen-Specific User Guide

The next button to the right on the toolbar is the **Screen-Specific User Guide** link: . Selecting this link will bring up the User Guide page for the screen currently being viewed. This page will appear in a new browser window without any of the normal browser menus, buttons, or editable URL field or the User Guide Table of Contents links. From there, you may select the **Main Help Page** link to view the table of contents.

Email Support

The next button to the right on the toolbar is the **Email Support** link: . Selecting this link will bring up the



email composition window of your default mail reader with the 8MS Help Desk Support email id pre-filled, along with a subject of *8MS Customer Support Question*. Just enter your question and send the email. It will be received by the entire 8MS Help Desk Support Team. See [Customer Support](#) on the [System Overview](#) page for more information on customer support.

This section provides access to the 8MS Frequently Asked Questions (FAQ) and several tutorials designed to provide additional information on using particular 8MS features. The following pages are included in this section:

FAQ A collection of Frequently Asked Questions, asked by users via email or phone.

Managing SMS Templates A tutorial introduction to SMS Templates and how to best use them.

Managing 8MS Routing Sets A tutorial introduction to 8MS Routing Sets and how to best use them.

Managing ROC Requests An overview of Somos ROC requests and how to use them within the 8MS User Interface and API.

Configuring ROC Access Step-by-step instructions on enabling Somos ROC for your 8MS company. ROC

Removing Invalid NPA-NXXs Step-by-step instructions on how to remove NPA-NXXs that are invalid in a working SMS Template or 8MS Routing Set.

Terminology Common terms and values necessary to understand 8MS, the 8MS user interface and the SMS/800 Toll-Free service.

This document is the 8MS Frequently Asked Questions (FAQ). It was written based upon commonly asked questions submitted by users. The FAQ is split out into multiple sections.

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- **Number Lists and Batches**
- **CAD, LAD and CPR**
- **SMS Templates**
- **8MS Routing Sets**
- **Search/Reserve**
- **Viewing Number Information**
- **SMS/800 Transactions**
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2. **What are service levels and why do I care?**
3. **What are API transactions?**
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8MS Service

1. *I've seen and heard references to the Shared, Dedicated and Private Platforms. What's the difference?*

A Shared Platform is an 8MS server that has multiple customers all sharing network bandwidth to SMS/800. This means that a customer's messages to SMS/800 get queued behind other customers' messages in a first-in first-out spool. If you pay for 8MS service based on either a service level (including Semi-Private) or the number of transactions per month than you are on the Shared Platform. A common name for the Shared Platform is the Service Bureau.

A Dedicated Platform is an 8MS server with a network connection to SMS/800 that is dedicated to a single customer and is run and managed at the customer's data center.

A Private Platform is an 8MS server with a network connection to SMS/800 that is dedicated to a single customer but is run at the 8MS data center and managed by the 8MS support team.

2. *What are service levels and why do I care?*

A service level is the level of service that you purchase from 8MS. Each service level allows you to store a set amount of toll-free numbers in the 8MS database and allows you a set amount of local deletions that you can perform. The higher a service level you purchase the more numbers you can store and the more local deletions you can perform. Since billing is normally performed on a monthly basis, you can change your service level prior to the start of a month. If you exceed the amount of numbers or the amount of local deletions within a single month there is an additional cost that will be charged to your account.

To further understand the impact of service levels we recommend that you read the [Local Data](#) section of this FAQ.

3. *What are API transactions?*

In addition to the 8MS Web User Interface, we also provide an Application Programmer Interface (API) that allows you to integrate 8MS with your own internal toll-free provisioning applications. The 8MS API is an HTTP-based interface, allowing you to use any programming language that allows generation of HTTP (web) requests. Responses are simple XML formatted documents.

The API documentation is available on our web site. If you are interested in hearing more about the 8MS API, please contact our sales team.

4. *Are there any limits on API transactions?*

When you purchase the 8MS API add-on feature you are given a set amount of transactions that you may send to 8MS. Additional transactions may be purchased, either ahead of time or on an as-needed basis.

Pricing and transaction amounts are not listed on the FAQ; these are listed on the 8MS Pricing sheet, which can be obtained by contacting our sales team.

Local Data

5. *What is local data on 8MS?*

Based on questions asked by our customers, one source of confusion is the concept of "local data". SMS/800 is the database of record for 8yy/Toll Free service. This means that the only data that is ever 100 percent accurate is the data stored in the SMS/800 database. However, to make it easier and faster to manage your data, 8MS keeps a local copy of all data about numbers that you have manipulated in 8MS. This local database is kept up-to-date via unsolicited messages from SMS/800. If a number in your RespOrg is changed by the SMS/800 user interface or API an unsolicited message is sent from SMS/800 to 8MS, notifying 8MS that a number has changed. In response to this unsolicited message, 8MS retrieves that number from SMS/800.

It should be noted that some data may exist in 8MS but not in SMS/800. Both SMS/800 and 8MS provide some form of cleanup of old records. It is possible that SMS/800 has done cleanup of it's Old records but 8MS has not. In that case, the data will only exist on 8MS. Under these circumstances, if 8MS local data for a number is deleted (via the **Delete Local** screen) and then retrieved (via the **Retrieve** screen or through an unsolicited message) then the Old records will no longer exist.

There is additional local data that exists in 8MS that has never existed in SMS/800. This includes data for two essential features that make 8MS what it is: Number Lists and 8MS Routing Sets.

6. *How can I refresh my local data?*

Besides the automated retrieve of data via unsolicited messages, the **Retrieve** screen allows you to retrieve a single number or a batch.

If you do not set the **Retrieve All Records** checkbox, only records with a status value which is set in the *RetrieveStatusList* parameter will be retrieved.

7. *How can I delete local data?*

If a number is given away the data for that number will be deleted as a result of an unsolicited message. If you want to manually delete data for a number use the **Delete Local** screen. You may delete all records for that number or one record with a specific date/time.

8. *How can I delete from SMS/800?*

Data is never explicitly deleted from SMS/800 by 8MS, except when requested by a user. A specific record, based on date/time, may be deleted from the **Delete From SMS** screen. This screen allows future pending records to be deleted. Records with a date/time in the past (including Active, Sending and Old) may not be deleted from SMS/800.

9. *How do I view my data?*

Information on toll-free numbers can be seen via several screens. The details on a single number may be seen on the **Record Management: SMS CAD** and **Record Management: SMS PAD** screens. A snapshot of a set of numbers (a number list, all numbers in a 8MS Routing Set, etc.) may be seen on the **Search Local Numbers** screen. A snapshot of the records of a set of numbers may be seen on the **Search Local Records** screen. Finally, SMS/800 may be queried for a snapshot of the most up-to-date records (if you suspect 8MS's data is out of sync) from the **Query** screen.

Note the difference between the **Query** screen and the other screens explained here. The **Query**

screen shows data as it is on SMS/800. The other screens show the data as it is on 8MS.

10. *How do I manage my numbers or transactions if I'm in an 8MS Service Level?*

The *Usage Counts* screen shows the number of transactions you have generated and the maximum amount of toll-free numbers you have on the system. This may be viewed per day, month or year. Since billing is done per month, viewing by month is the default. As long as the number of transactions or maximum amount of toll-free numbers per month does not exceed your limit you are okay. If you have exceeded the limit, the value shown will be highlighted.

If you need to bring in additional numbers, create a number list of these numbers. This can be done within 8MS or as a text file which can be loaded into 8MS. Once your number list exists in 8MS, go to **Search Local Numbers**. Choose the number list and hit *Show Counts* to check if you already have some of these numbers in 8MS without wasting any transactions by querying them through SMS/800. Numbers with a status of Unknown are not in the 8MS database; they will need to be retrieved from SMS/800. From **Search Local Numbers** select the checkbox *Unknown Entries Only* and select the *Create Number List* button. These numbers may now be retrieved from the **Retrieve** screen.

If you are about to exceed your limit you may delete numbers from the 8MS database via the **Delete Local** screen. This will not remove numbers from the SMS/800 database, only from 8MS. These numbers may always be retrieved again at a later date.

Number Lists and Batches

11. *What is a Number List?*

A number list is simply a list of Toll Free Numbers. While there does not need to be any relationship between the numbers, typically number lists are created to manipulate the set of numbers in some common way.

12. *What is a Batch Job?*

A batch job is an operation performed on a number list. The majority of the 8MS screens allow you to perform an operation on either a single number or some form of number list.

Be aware that certain actions on batches will fail if the numbers are unknown or are not owned by you. For example, if you try to run a batch on **Copy Record**, **Record Management: SMS CAD** or **Record Management: SMS PAD** send and some of the numbers are unknown the batch job will fail.

13. *What is the difference between a Number List and a List of Numbers?*

A List of Numbers has no name associated with it and is dynamically created on one of the Batch Popup screens. This list may not be referenced from other screens since, without a name, there is no way to refer to it.

A Number List is a list of numbers with an associated name. This name may be selected from a drop-down list which contains the names of all number lists created by you or someone else in your company.

14. *How can I create a Number List?*

A number list can be created from a variety of screens in 8MS. The most straight-forward way is to go to the **Number List Administration** screen.

A Number List may be created on your PC as a normal text file and uploaded (via the **Upload List** button). Be aware that the file **MUST** be a plain text file; it may **NOT** be in an application specific format such as an Excel spreadsheet. The list may be separated by spaces, tabs, commas or newlines. There must be no control characters in the list or the upload will fail.

A Number List may also be downloaded onto your PC via the *Download List* button, which brings the list up inside a browser window. The list may be selected, copied and then pasted into an application or it may be saved via the *Save Page As* button on the File menu.

A Number List may be created from various screens which provide lists of numbers for viewing, such as **Search Local Numbers** and **Search Local Records**.

Number Lists are also created when a Search or Reserve is run, unless you explicitly unselect the *Create Number List* checkbox. If you don't provide a name for the Number List on this screen, the name of the number list will be something like "Search: successes - C43F4" or "Reserve: successes - C43F4". A Number List name may always be changed later.

One additional screen that allows Number Lists to be created is the **Batch Log** screen. This screen shows the status of running and completed batches. Each number is in one of the following status values: New, Queued, Success, Failure, Error, Total. To the right of each status is the amount of numbers in that status. Each status (the text of the word itself) may be clicked to get the list of numbers that are in that status. These numbers may then be put into a Number List. This is especially powerful when dealing with numbers in the Failure status. Upon completion of a batch, all failed numbers may be put into a Number List and then retried or manipulated in some other way.

15. *What is the limit on the size of a number list?*

There is no limit on how large a number list can be. However, the text area that allows numbers to be entered (from the *Whole List* button on the **Number List Administration** screen) has a limit of 10,000 numbers. If you want to create a large list of numbers (i.e. greater than 10,000 numbers) it is recommended that you create them using a text editor and then upload the number list via the *Upload List* button on the **Number List Administration** screen.

16. *How can I easily add or remove numbers from a number list?*

The Multi-List function on the **Number List Administration** screen allows 2 number lists to be cross-compared and merged. You may simply add 2 number lists together, add numbers only in both lists or remove numbers in one list from another list. You can also add or remove single numbers using the *Toll Free Number* box if you are in *Single Number* edit mode.

17. *How do I remove Unknown numbers from a number list?*

Unknown numbers are numbers for which 8MS has no status. These will most commonly show up when a number list contains numbers that do not belong to you. To remove these numbers from a number list, go to the **Search Local Numbers** screen. Select the number list from the drop-down list. Click on the *Create New List* button and save the list. All numbers with a status of Unknown will be eliminated from the new list.

18. *How do I delete a number list?*

From the **Number List Administration** screen, select the Number List and click the *Delete* button.

Note that deleting a Number List does not affect the number data. All data for any numbers in the list remains untouched.

19. *How can I stop a batch from running?*

The **Batch Log** screen allows you to view and manage all batches. Unless the *Include Completed Batches* checkbox is selected, only running batches are shown. In the top frame select the batch you want to stop. In the middle frame, information about the batch will appear. A button labeled *Hold* will appear on the right in that middle frame. Select the button. The status will change from "Message In Progress" to "Message In Progress (Held)". At this point you may either release the batch to continue running (see below) or delete the batch.

Note that completed batches cannot be put on hold.

20. *How can I resume a stopped batch?*

From the **Batch Log** screen, in the top frame select the batch you want to start. In the middle frame, information about the batch will appear, as well as two buttons labeled *Delete* and *Release*. To resume the batch, click on the *Release* button. The status will change from "Message In Progress (Held)" to "Message In Progress".

21. *I'm on the Shared Platform and I have a batch scheduled to run now. Why isn't it running?*

On the Shared Platform, Batches for a company are run sequentially, not in parallel. If there are two batches, for the same company, scheduled to run at the same date and time, the first batch to enter the queue is chosen.

22. *Is there a maximum amount of toll-free numbers that can be updated in a batch?*

There is no set limit. You can upload a number list of any size to do a batch **Copy Record** or a batch change from **Record Management: SMS CAD** with either a source record or a source 8MS Routing Set.

We do recommend keeping the lists to a manageable size for ease of management for yourself. A reasonable size is probably in the range of 10,000 to 20,000 numbers.

23. *Why don't the counts shown in the Batch Log and Activity Log for a Batch Reserve match the amount of numbers reserved?*

Most messages sent to SMS/800 accept a single toll-free number. However, the message sent to SMS/800 for a reserve allows up to 10 numbers to be specified. Therefore, the number of messages sent will always be the total amount of numbers reserved divided by 10. For example, a reserve of up to 10 numbers will show a single transaction sent to SMS/800, between 11 and 20 will show 2 transactions, etc.

When the number list contains patterns this gets a bit trickier. Each pattern has to go in its own message; it cannot be combined with specific numbers. So as 8MS goes through a number list, each time a pattern is found it is sent by itself. After that pattern is sent up, numbers are again grouped into sets of 10 until the next pattern is hit or the end of the list is reached.

24. *Why can't I see all my Number Lists in the Number List drop-down list on various screens?*

Some customers have a large amount of number lists which causes screens with the Number List drop-down to download very slowly. To reduce the time it takes for these pages to download, 8MS only shows the top 10 most recently modified or created Number Lists. To view all 8MS Routing Sets, click on the small red button to the right of the Number List dropdown list. To change the amount of Number Lists that is initially downloaded set the **RecentNumberListCount** preference. To view specific Number Lists along with the recently used number lists, set the **MyNumberLists** preference.

25. *How do I copy a Number List?*

Number Lists may be copied several different ways. If the number list is small (less than approximately 10,000 numbers) it may be copied using the **Number List Administration** screen. Select the number list you want to copy. Now click on the *Whole List* button. A text area will appear in the bottom frame of the screen, with all the numbers in the source list. Now select the *or create a new one* checkbox. Enter your new list name in the *List Name* field and select the *Update* button.

Another way to copy any size number list is by using the **Search Local Numbers** screen. Choose the source number list from the *Number List* drop-down list and click on the *Create Number List* button. The *Create Number List* popup will appear. Enter your new number list name and select the *Update* button.

If you want to copy and then modify a list, you can download the list, edit it with any text editor, and then upload the list. From the **Number List Administration** screen, select the *Download List* button. A new browser window will appear. Under the *File* menu select *Save Page As....* Set the *Save as type* to "Text Files", enter the file name and select the *Save* button. Now edit that file, using your favorite text editor. When you are done, go back to the **Number List Administration** screen, select the *or create a new one* checkbox, enter your new list name in the *List Name* field and select the *Upload List* button. In the bottom frame, enter the file name and select the *Upload File* button. Your new number list will be created.

Search/Reserve

26. *Is there a limit to the amount of numbers that can be reserved?*

By default, on the Shared Platform, 1000 random numbers may be reserved. This limit is to prevent accidentally reserving (and paying for) a large amount of numbers. If you are doing a search for a pattern we recommend that you limit the quantity to assure a faster response.

If you are running on a Private or Dedicated Platform that limit is tunable.

A Batch Reserve has no limit to the amount of numbers that may be reserved.

27. *Why can't I search for more than 10 contiguous numbers?*

When you execute a Search from 8MS, SMS/800 puts a one minute lock on the numbers found. Since

the mechanism 8MS uses to search for contiguous numbers may take more than one minute, it is quite likely that the lock will not exist by the time you are ready to reserve the found numbers. As a result, the 8MS team has chosen to put the 10 number limit. You may still reserve more than 10 contiguous numbers; it is only the search that is limited.

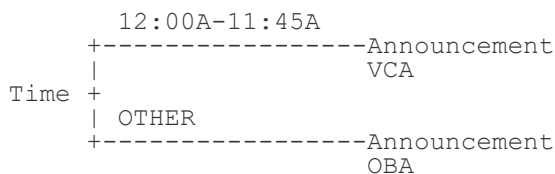
28. *Why can't I reserve a large amount of contiguous numbers?*

8MS has no limit on the amount of contiguous numbers you may reserve. However, SMS/800 can only provide large sets of contiguous numbers if they are actually available. Additionally, SMS/800 does not search all the NPA databases (800, 888, 877, 866) when a search is done; it selects one and searches only that database. Since 833 is the newest toll-free number database, it is the one that will most likely produce larger sets of contiguous numbers. When doing a reserve for a large set of contiguous numbers, enter an NPA of 833 to increase the chance of getting the set of numbers you want.

29. *How can I extend the reservation of a number?*

While SMS/800 has a limit on how long a number can remain in the reserved state, it is possible to keep a number around by activating the number with a CPR that will never actually route the call to a destination. Activating the number ensures that it will never be spared until you chose to spare it.

This can be done many different ways, but the simplest is to create a CPR that splits traffic based on a Time node. The Time node will have two branches. The first branch has a value of 12:00AM-11:45AM; this branch routes to a VCA Announcement. The second branch has a value of OTHER; this branch routes to an OBA Announcement.



CAD, LAD and CPR Data

30. *What are CAD, LAD and CPR?*

CAD stands for *Customer Administrative Data* record. A CAD is a toll-free number record that contains both routing and administrative data and is scheduled on SMS/800 to go active on a specified date and time. A CAD record remains in effect until another CAD record replaces it or the toll-free number is **Disconnected**.

CPR stands for *Call Processing Record* record. Alternate names for a CPR are *Routing Plan* and *Complex Record*. A CPR contains a set of advanced routing features that define how to route a call to a carrier. On 8MS, a CPR is associated with a CAD on the **Record Management: SMS CAD** screen. Nodes on a CPR specify decision points and branches are the possible choices (paths) to take based on the node type.

LAD stands for *Label Administrative Data* record. A LAD contains a set of label definitions. Values on a CPR branch have a limited size. To allow larger values to be specified on a branch, CPRs have labels. A label consists of a node type, label name and set of values. The set of labels in a CPR are stored in a LAD. A LAD is associated with a CAD, just like a CPR.

31. *Are there any limitations on provisioning a new record?*

Records may not be scheduled in the past; only future dates/times or "now" may be used.

32. *Why doesn't a CPR go active when I save it?*

A CPR is created in EditPlan, the cpr editor. This is accessed via **Record Management: SMS CAD**, **CPR Management** and **SMS Template Management** screens. Saving a CPR from the editor does not automatically send the CPR to SMS. A CPR is sent to SMS/800 by creating a new CAD record in **Record Management: SMS CAD** or new TAD record in **SMS Template Management** and sending that record to SMS/800 via the "Send" button.

33. *How do I Disconnect a number?*

The **Disconnect** screen allows you to delete a single number or a batch. A future date/time or "now" must be provided.

If an "End Intercept Date" is provided then this number will go Transitional on that date. If the End Intercept Date is "now" the number will go Transitional immediately.

A disconnect will fail if there are any future records (including Pending and Invalid) waiting to go at SMS/800. These records must be deleted first, via the **Delete from SMS** screen.

Batches of numbers may be disconnected as long as the disconnect date/time and end intercept date will be the same for all the numbers.

A disconnect will also be generated from **Record Management: SMS CAD** if an *End Intercept Date* is entered. This allows the user to change the record in the same transaction as the disconnect.

34. *How do I "Un-disconnect" a number?*

If a number was accidentally disconnected it may be reactivated if it hasn't been spared yet. Bring up the Old (disconnect) record in **Record Management: SMS CAD**. Clear the *End Intercept Date* field and send the record up to SMS/800. This will make the number route as it did before it was disconnected.

35. *What does it mean if a record is stuck in the Sending state? What should I do to resolve this?*

Occasionally a record will get stuck in the Sending state if one or more SCPs fails to load the record. Usually an unsolicited message will be sent from SMS/800 within 1-2 hours indicating this. A list of SCPs that have failed to load the record is provided with this unsolicited message; this list can be seen via the Activity Log screen in the detail (bottom) frame.

A problem like this is normally beyond the control of 8MS. You should call the SMS/800 Help Desk to report this and SMS/800 support will investigate the problem.

36. *Are the Area of Service values defined somewhere?*

These are defined in the **8MS User Guide**, under **Service Area** Definitions accessible under the **Record Management: SMS CAD** and **SMS Template Management** sections.

37. *What is the Area of Service limit in the CAD and TAD?*

The 8MS interface to SMS/800 has a limit of 34 codes to be set in the CAD or TAD. If more than 34 codes are to be used they must be set in the CPR.

38. *What are those green dots between the labels and text fields on the Record Management: SMS CAD, Record Management: SMS PAD and SMS Template Management screens?*

When a record is sent to SMS/800 on any of these screens, normally all fields on the screen are included in the message. It is possible to limit the fields included in the message. The green dot indicates what fields will be included.

If, for any reason, you don't want to modify certain fields, click on the green dot, setting it to red. When the message is sent to SMS/800, any fields which are red will not be sent in the message.

If you only want to send one or two fields, the process described above can be a bit tedious. Instead you can select the green dot to the right of the one of the main sections (e.g. *Number Information* or *Service Area*). This will set the dot for all fields in that section to red. Select the red dot, setting it to green. When the message is sent to SMS/800, only the green fields will be sent in the message to SMS/800.

Perhaps the most common use for this feature is to move a set of Working numbers into a specific 8MS Routing Set, but not modify the Notes section of the CAD.

On the **Record Management: SMS CAD** screen select the source 8MS Routing Set. After the screen populates, select the dot next to the *Notes* section, turning the green dot to red. Now send the batch of numbers up to SMS/800. The records will all be routed like the specified 8MS Routing Set but the Notes will be what they were prior to the routing change.

Another common use of this feature is to leave the *Contact Name* and *Contact Phone* as they were. This is done the same as leaving the Notes, as described above.

39. *What is the maximum size of a CPR?*

Defining the maximum size of a CPR is a complex issue. The SMS/800 API over which 8MS talks with SMS/800 allows a maximum message size of 600 Kbytes. That size includes information related to message communication along with the data to be sent to SMS/800. Thus, the simple answer is a CPR must be "something less than 600 Kbytes".

Knowing this size limit does not enable you to know the size of the record you are sending up. A CPR on 8MS is formatted differently than the record sent up to SMS/800 in the API message. The size of a CPR as you see it in 8MS's **CPR Management** screen is not the size of the message that will be sent up to SMS/800. The 8MS internal format is probably a little smaller in size; when it converts the CPR from the internal format to the SMS/800 API format the CPR will grow.

There is another factor that influences CPR size. SMS/800 may accept a CPR of close to 600 Kbytes, but this does not guarantee that all SCPs will accept this CPR. For example, the Canadian SCPs have greater restrictions on what they will allow and, most likely, accept a smaller size CPR. Additionally, just as a CPR format on 8MS does not match a CPR format on SMS/800, a CPR format on SMS/800 most likely does not match a CPR format on an SCP. Thus, the size of a CPR on an SCP will probably not match the size of a CPR on SMS/800. When a new record is being activated on SMS/800, all SCPs are

updated, whether the SCPs are involved in the routing or not. So your CPR cannot be larger than 600 Kbytes, but also needs to be smaller than that depending on the smallest maximum size of a CPR on all the SCPs.

If you have concerns regarding the size of your CPR, it is suggested that you do the following. Set up your routing for a single toll-free number and send it up to SMS/800. If that record goes active (specifically Active, not Pending or Sending) then your CPR size is good and you can set up a batch for the rest of your numbers. In that way you won't have to deal with multiple failures should the record turn out to be too large for an SCP.

If you have concerns about your CPR size, when you set up your batch, be sure to set your *Max Records per Hour* on the batch popup to avoid exceeding the SMS/800 5% CPU rule.

SMS Templates

40. *What is an SMS Template?*

Every Working toll-free number has a set of routing data associated with the number. This set of data defines how calls are routed to a carrier for that number and what areas may dial the number. The routing data is typically bound to the specified number via the CAD, LAD and CPR. (See [What are CAD, LAD and CPR?](#) for more details.) As an alternative to binding the routing data to a number, an SMS Template (also known as a TAD record) may be defined which contains the routing data. In this case, the SMS Template is pointed at by the number using a Pointer record (also known as a PAD record).

41. *What are CAD, PAD and TAD records?*

As explained in the question [What are CAD, LAD and CPR?](#), a CAD is a toll-free number record that contains both routing and number administrative data.

A TAD is an SMS Template record that contains routing and template administrative data.

A PAD is a toll-free number record that contains a subset of CAD administrative data plus a pointer to a TAD record.

A toll-free number is routed using either a CAD or a combination of a PAD and TAD. See the question [Why would I want to use an SMS Template?](#) for details on why a PAD/TAD combination may be beneficial.

42. *Why would I want to use an SMS Template?*

When using a CAD record, routing is bound to a particular toll-free number. If a number needs to be re-routed, it is necessary to create a new, Pending CAD record. If multiple numbers used the same routing logic and they all needed to be updated then it is necessary to update all the numbers. In 8MS this is not an issue because 8MS allows batches of numbers, so the update is done in a single user action. This does take some time, because 8MS sends record updates for each number, one at a time. If the CPR (routing plan) is large, the records will be throttled so only a few dozen (more or less) would be sent to SMS/800 to avoid exceeding CPU % usage.

When using a PAD/TAD combination the routing is independent of the toll-free number. After creating a

TAD, one or more toll-free numbers may be pointed at this TAD record by creating PAD records. If the CPR is large, the PAD records do not need to be throttled because no routing data is being sent up with the PAD records; it was already sent in the TAD record. Once these PAD records are loaded at SMS/800, if the routing needs to be changed, it is only necessary to update the TAD, no changes need to be performed on the numbers.

43. *How do I convert an 8MS Routing Set into an SMS Template?*

See the **Using SMS Templates - A Work Flow** section of the **Managing SMS Templates** tutorial for details on how to do this.

44. *How do I convert a CAD record into an SMS Template?*

The process for this is that same as converting an 8MS Routing Set into an SMS Template. See the **Using SMS Templates - A Work Flow** section of the **Managing SMS Templates** tutorial for details on how to do this.

45. *How do I convert an SMS Template into an 8MS Routing Set?*

See the **Using SMS Templates - A Work Flow** section of the **Managing SMS Templates** tutorial for details on how to do this.

8MS Routing Sets

46. *What is an 8MS Routing Set?*

An 8MS Routing Set is the route-affecting data defined in the CAD, CPR and LAD of a toll-free number. This data is associated with a specific record (i.e. CAD, CPR and LAD for a specific date and time), not the toll-free number itself. To say that two records have the same 8MS Routing Set is to say that they "route the same".

47. *How are 8MS Routing Sets created?*

When 8MS sees a new record for a toll-free number, it analyzes the CAD, CPR and LAD and stores it in the 8MS database in a pre-defined format as an 8MS Routing Set. This 8MS Routing Set is compared against all other existing 8MS Routing Sets. If it is found to be unique (i.e. no matches were found) then a unique name is generated for the 8MS Routing Set. If it is found to match an existing 8MS Routing Set, the newly created 8MS Routing Set is thrown away and the record is associated with that existing 8MS Routing Set.

48. *How can I determine the 8MS Routing Set that a record is associated with?*

See the question **How can I find what numbers are assigned to specific 8MS Routing Sets?**

49. *How can I rename an 8MS Routing Set?*

The **8MS Routing Set Management** screen allows you to rename a 8MS Routing Set. Select the 8MS Routing Set you wish to rename, enter the new name in the *Rename selected 8MS Routing Set to* text

field and click on the **Save** button.

50. *How do I use an existing name for a new 8MS Routing Set?*

Occasionally a standard 8MS Routing Set will need to be changed. However, when a new 8MS Routing Set is created it is always given a unique, system-generated name. You probably want that new 8MS Routing Set to have your standard routing name, but there is no way to remove a name from a named 8MS Routing Set. So how do you provide an existing name to a new 8MS Routing Set? You can do this in 2 different ways.

One way is to rename the old 8MS Routing Set to another name and then give the new 8MS Routing Set the old name. Renaming a 8MS Routing Set is done on the **8MS Routing Set Management** screen. Select the old 8MS Routing Set from the *Select 8MS Routing Set* drop-down list, enter a new name in the *Rename selected 8MS Routing Set to* field and select the **Save** button. You can now do the same thing with the new 8MS Routing Set, assigning it the old name.

While that seems simple enough, there is a down-side to doing this. 8MS cleans up old 8MS Routing Sets that are not referenced by any Active, Pending or Sending 8MS Routing Sets once they have aged out. However, user named 8MS Routing Sets are never removed from 8MS. Thus, if you perform the method described above, and do this on a regular basis, you will end up with many old, unused, named 8MS Routing Sets. This makes it difficult to keep your 8MS Routing Sets straight, as users will quite often give them names like "Old Standard Routing", "Old Standard Routing 3/23/05", etc. Additionally, named 8MS Routing Sets always appear at the top of the *8MS Routing Set* drop-down list, cluttering up your 8MS Routing Set choice list.

You work around this problem by deleting the old 8MS Routing Set rather than renaming it. As long as there are no toll-free numbers in this 8MS Routing Set that are in the Active or Sending state, the 8MS Routing Set may be deleted. Go to **8MS Routing Set Management**, select your 8MS Routing Set and select the *Delete* button. 8MS will search for all records in this 8MS Routing Set. (Bear in mind that this will take longer than most queries on 8MS.) If there are Working records in this 8MS Routing Set you won't be allowed to delete the 8MS Routing Set. Otherwise a popup will appear that shows any records in states other than Active and Sending, and asks if it can delete these records as well as the 8MS Routing Set. If you select **Delete** on the popup, records will also be deleted from 8MS but, again, not from SMS/800. These numbers can always be retrieved later. After the delete has completed, select the new 8MS Routing Set and rename it to the old name.

If you are concerned about the Schedule records being deleted, you can always cancel the delete, go to **8MS Routing Set Info**, select the old 8MS Routing Set and select *Create Number List* to save the numbers in a number list prior to deleting the 8MS Routing Set.

51. *How do I make a number route as defined by a 8MS Routing Set?*

Using either **Copy Record** or **Record Management: SMS CAD** you may specify a source record of a 8MS Routing Set rather than a number. You may also select any number in the 8MS Routing Set as a source.

52. *Why can't I see all my 8MS Routing Sets in the 8MS Routing Set drop-down list on various screens?*

Some customers have a large number of 8MS Routing Sets. This causes screens that have the 8MS Routing Set drop-down (e.g. **Record Management: SMS CAD**, **Search Local Numbers** and **Search**

Local Records) to download very slowly. To reduce the time it takes for these pages to download, 8MS only shows the top 10 most recently modified or created 8MS Routing Sets. To view all 8MS Routing Sets, click on the small blue button to the right of the 8MS Routing Set dropdown list. To change the number of 8MS Routing Sets that is initially downloaded set the **RecentRoutingSetCount** preference. To view specific 8MS Routing Sets along with the recently used 8MS Routing Sets, set the **MyRoutingSets** preference.

53. *How can I force my 8MS Routing Sets to show at the top of the 8MS Routing Set drop-down list?*

The **MyRoutingSets** parameter can be set to a list of 8MS Routing Set names. Each 8MS Routing Set in this list will always be at the top of the 8MS Routing Set drop-down list on all screens as long as the 8MS Routing Set exists.

54. *How can I keep unused 8MS Routing Sets from being deleted?*

Since the number of 8MS Routing Sets a customer may have can become very large, 8MS automatically removes unused 8MS Routing Sets after they have aged. Only 8MS Routing Sets with auto-generated names are deleted; once a customer has given a 8MS Routing Set a name, that 8MS Routing Set is never deleted. See the question **How can I rename a 8MS Routing Set?** in this section.

55. *How do I delete unused 8MS Routing Sets?*

From **8MS Routing Set Info**, select the "Show Number Count" checkbox and put the value "0" in the "Max" field to the right of this checkbox. Click the *Retrieve* button.

This will show all 8MS Routing Sets that have no numbers associated with them.

Now click the "Delete" button.

A popup will appear that says

*"X of the selected 8MS Routing Sets is referenced by the following: X1 OLD record(s), X2 FAILED record(s), ...
To delete these customer records as well as any 8MS Routing Sets that reference them, click the Delete All button."*

Click the *Delete All* button to delete the 8MS Routing Sets and other associated records.

Viewing Number Information

56. *How can I find what numbers are assigned to specific 8MS Routing Sets?*

Search Local Numbers shows the 8MS Routing Set to which each record has been assigned. Choose the *8MS Routing Set* to identify any number that has any of its' records using this 8MS Routing Set.

57. *How can I get the status of each Number?*

Search Local Numbers shows the status of the number.

Search Local Records. shows the status of each record for a number. You may filter out numbers by

status. For example, click the *Sending* checkbox and click on the *Retrieve* button to view all records currently in the Sending state.

58. *How can I find numbers that use (or don't use) a particular Carrier?*

Search Local Records. has a *Show CIC* checkbox which will show the CIC(s) being used by each record. You may specify one or more CICs in the textfield to the right of this checkbox. Additionally, there are radio buttons to the right of the textfield which allow you to say *Any*, *All*, *Exact* and *Not*. So, for example, you may say something like "show me all records which do NOT route to this Carrier" by clicking the checkbox, entering the CIC and clicking the *Not* radio button.

SMS/800 Transactions

59. *What is that 'The request did not complete within 30 seconds' message?*

When 8MS sends a single number (non-batch) message to SMS/800, it normally waits up to 30 seconds. When you hit the send button, you will see a popup that says "Waiting 30 seconds for response...". There are various reasons why 8MS may not get a response from SMS/800. One common reason is simply that SMS/800 is bogged down with requests by all it's customers. The 30 second timeout value is tunable per Customer. See *ResponseWaitTime* in the **8MS User Guide** in the section **Customizing 8MS**.

60. *How can I see the results of a request that timed out?*

All activity may be viewed in the **Activity Log**. Click the *Apply* button. If the status is "Success" or "Failure" then the request has completed. In the middle of the screen, click on the record that you were waiting for and the bottom area will show the details that you would have seen had the request completed within the timeout period.

61. *What are unsolicited messages?*

Most messages sent from SMS/800 are in response to requests sent from 8MS. However, there is a set of messages that can be sent to 8MS without 8MS first sending a request to SMS/800. These messages are known as unsolicited messages and are designed to keep 8MS data in sync with SMS/800. If a user performs certain actions on another 8MS platform (i.e. another API client) or on the SMS/800 user interface, SMS/800 will notify 8MS that this action was taken.

The most important unsolicited messages sent from SMS/800 are notifications of number reservations, scheduling of CAD, PAD and TAD records and RespOrg changes. When 8MS receives an unsolicited message from SMS/800 regarding one of these items, 8MS will then send retrieve requests to SMS/800 asking for the new data. In this way, 8MS keeps it's database in sync with SMS/800.

8MS customers always have the option to turn off one or more unsolicited messages by submitting a request to 8MS. This is most often requested when an 8MS customer wants to avoid exceeding their number limits by disabling RespOrg changes and number reservations. This prevents 8MS from ever downloading numbers from SMS/800 without the users' explicit requests to do so.

Configuring 8MS for a Customer or User

62. *What are the tunable preferences a company or user may set?*

There are three types of tunable preferences which may be set. Company preferences are set for all users of a company. User preferences are set for a specific user in a company. Company/User preferences are set for all users of a company but each user may provide an override value if the user does not like the company value. All tunable preferences are documented in the **8MS User Guide** in the section **Customizing 8MS**.

Additionally, the user interface menu may be customized. This is also discussed in the same section of the **8MS User Guide**.

Web Browser

63. *What web browsers are currently supported?*

The currently support browsers is shown on the bottom of the **Welcome Page**. This page is shown immediately after logging in to the 8MS user interface and is also accessible from the menu.

64. *How do I need to configure my browser to use 8MS?*

Popups

8MS uses popups extensively. Therefore, popup blocking should be turned off, or the browser should be configured so that it allows all popups from 8MS.

Cache Settings

Most browsers provide a means to set when to refresh cached data. 8MS requires that data be refreshed every time.

This document is intended as an aid to introducing SMS Templates, how to create, modify and manage them and how reference them in toll-free numbers.

SMS Template Definition

Before SMS Templates were added to SMS/800, routing was bound to a particular toll-free number. If a number needed to be re-routed, it was necessary to create a new, Pending CAD record. If multiple numbers used the same routing logic and they all needed to be updated then it was necessary to update all the numbers. In 8MS this was not an issue because 8MS allows batches of numbers, so the update was done in a single action. However, this still took time, because 8MS would send record updates for each number, one at a time. If the CPR (routing plan) was large, the records would be throttled so only a few dozen (more or less) would be sent to SMS/800 to avoid exceeding CPU % usage.

SMS Templates provide a way to define routing logic that is independent of the toll-free number record. After creating an SMS Template, one or more toll-free numbers may be pointed at this SMS Template. If the numbers pointing at this SMS Template need to be re-routed, it is only necessary to update the SMS Template routing; no changes need to be performed on the numbers. Note that an SMS Template is not a panacea and has some limitations. For example, if some of the numbers pointing at the SMS Template are to be re-routed but other numbers are not, it is necessary to re-route those individual numbers.

The fields contained in an SMS Template are a subset of the fields in a toll-free number CAD record. One set of fields defines the routing while another set defines administrative data. Specifically, an SMS Template is composed of the routing fields *InterLATA Carrier*, *IntraLATA Carriers*, *Complex Record* and *Number of Lines* plus the *Service Area*. An SMS Template also contains the administrative fields *Notes*, *Contact Name*, *Contact Phone*, *Resp Org*, and *Description* (a new field for providing notes on the SMS Template itself). SMS Templates are scheduled the same as CAD records and have most of the status values of CAD records (e.g. Active, Sending, Pending, Old). On SMS/800 an SMS Template record is known as a TAD record.

An SMS Template is referenced by a number using a new form of a CAD record called a PAD (or Pointer) record. In SMS/800 terminology, a toll-free number *points* at an SMS Template through a PAD record. A PAD record is a subset of the fields in a CAD record (specifically the administrative fields) plus the name of an SMS Template. PAD records are scheduled the same as CAD records and have all the status values of CAD records (e.g. Active, Sending, Pending, Old, Hold, Must Check).

Creating SMS Templates

SMS Templates are created on the **SMS Template Management** screen. This screen has a behavior very similar to the **Record Management: SMS CAD** (formerly the **CAD Management**) screen. Data may be populated by selecting a source record of an 8MS Routing Set, CAD record, or an SMS Template record. Once the data is populated, the SMS Template record is sent to SMS/800. This is done by populating the SMS Template name and activation date/time, located in the upper right side of the screen (in the *Schedule* column), and then selecting the *Send* button. Again, this behavior is just like the **Record Management: SMS CAD** screen.

An SMS Template name has restrictions. The name must be 4-15 characters long, the first character must



be a '*', the second and third characters must be your company's SMS/800 Entity code (the first two characters of the RespOrg) and all other characters must be alphanumeric or dashes.

Pointing Numbers at an SMS Template

Toll-free number PAD records are created on the **Record Management: SMS PAD** screen. This is a tab on the **Record Management** screen, located to the right of the **Record Management: SMS CAD** tab. This screen also has a behavior very similar to the **Record Management: SMS CAD** screen. Data may be populated by selecting a source record of an 8MS Routing Set or a CAD record. Once the data is populated and an SMS Template is selected, the PAD record is sent to SMS/800. This is done by populating the toll-free number and activation date/time, located in the upper right side of the screen (in the *Schedule* column), and then selecting the *Send* button just as is done on the **Record Management: SMS CAD** screen. Since PAD records are toll-free number records, the *Send Batch* feature is also available, so multiple numbers may be pointed at an SMS Template in a single action.



A toll-free number may not point at an SMS Template until the SMS Template is in the *Active* status. If a PAD record is sent to SMS/800 and that record points at an SMS Template which is in any status other than Active, the PAD record will be rejected.

SMS Templates as an 8MS Data Source

SMS Templates are similar in concept to 8MS Routing Sets. SMS Templates may be used in the following ways in 8MS:

- to populate either the **Record Management: SMS CAD** or **SMS Template Management** screen
- as the source of a **Copy Record** batch
- as the destination of any batch (which means use all numbers on 8MS that point at a particular SMS Template)
- searching numbers and records in **Search Local Numbers** and **Search Local Records**

Managing SMS Templates

SMS/800 is the database-of-record for SMS Templates, just as it is for toll-free numbers. 8MS normally keeps all data (both numbers and SMS Templates) in sync with SMS/800 via unsolicited messages (see the questions **What is local data on 8MS?** and **What are unsolicited messages?** in the **8MS FAQ** for details on unsolicited messages). However, the user always has the option of deleting SMS Templates from the local 8MS database (without affecting the data on SMS/800) using the **Delete Local SMS Template** screen or retrieving SMS Templates from SMS/800 **Retrieve SMS Template** screen.

Since SMS Template data is stored on the local 8MS database, SMS Templates may be searched. As mentioned above, both **Search Local Numbers** and **Search Local Records** allow an SMS Template to be used as part of the filtering on numbers and records. In addition, there is a new **Search Local SMS Templates** screen that behaves much like the **Search Local Records** screen except that it allows you to view information about SMS Template records rather than toll-free number records.

Using SMS Templates - A Work Flow

While all this discussion on what an SMS Template is and how it's used is interesting, a few simple examples of how to work day-to-day with SMS Templates should make it much clearer.

1. Converting an existing CAD record to an SMS Template

- i. Go to the **SMS Template Management** screen. Select the 8MS Routing Set or enter the toll-free number (and date/time if using any record other than the Active record) to be used as the source. The screen will be populated with the data from the specified source. Enter the *Resp Org* that will be the "owner" of the SMS Template. Enter a new SMS Template name and date/time ("now" is acceptable) and select the *Send* button. If the *CPR* and *Service Area* combination are valid then the SMS Template should go to the *Active* state.
- ii. Go to the **Record Management: SMS PAD** (PAD, not CAD) screen. Select one number to point at this new SMS Template.



It is suggested that a single number be pointed at an SMS Template when doing the first few conversions.

(Remember that the SMS Template must be *Active* for the PAD to pass validation.) Populate any missing data and select the SMS Template name from the *SMS Template* drop-down list. Select the *Send* button (setting the date/time if necessary). The record should go to the *Active* state.

- iii. Now additional numbers from this 8MS Routing Set may be pointed at the new SMS Template. Go to the **Copy Record** screen. Select the toll-free number used in the previous step to be the source record.



A source record of a PAD record or an SMS Template will create PAD records for each number. A source record of a CAD record or an 8MS Routing Set will create CAD records for each number.

Select your 8MS Routing Set as your destination. All numbers that are currently in this 8MS Routing Set will be pointed at the SMS Template pointed at in this PAD record. Set the date/time as appropriate and select the *Send* button. When the batch completes, your 8MS Routing Set should be empty and all numbers will be pointing at the SMS Template.

2. Converting an SMS Template to a CAD Record and 8MS Routing Set

- i. Go to the **Record Management: SMS CAD** screen. Enter a toll-free number and date/time of the PAD record or select the SMS Template and date/time of the SMS Template record to be used as the source. The screen will be populated with the data from the specified source. Note that the **Record Management: SMS CAD** screen is only populated with data that is available from its source. If an SMS Template is selected, many of the CAD fields will be blank. Enter the toll-free number and date/time and select the *Send* button. If the data is valid then the record should go to the *Active* state. Shortly after that the 8MS Routing Set will be created if it didn't already exist.
- ii. Now additional numbers pointing at this SMS Template may have new CAD records created. Go to the **Copy Record** screen. Select the toll-free number used in the previous step or the 8MS Routing Set to be the source record. Specify your destination list of numbers. If all numbers currently pointing at this SMS Template are to be set up with CAD records then select the SMS

Template as the destination. Set the date/time as appropriate and select the *Send* button. When the batch completes, all your numbers should be in the 8MS Routing Set created (or referenced) in the previous step.

- iii. If the SMS Template is no longer needed, it may be disconnected. Go to the **Disconnect SMS Template** screen. Enter the date/time when the SMS Template should be disconnected and select the *Send* button.

As with other data in 8MS, SMS Templates can be used in powerful ways. It is difficult to document all the possible options. If you have questions about the best way to work with your numbers and records, the 8MS support team is always available to help you. Please feel free to contact us if you have questions or need more information about SMS Templates.

This document is intended as an aid to moving 8MS Routing Sets from one 8MS platform to another. It also discusses renaming them and updating the non-routing-affecting data in an 8MS Routing Set.

8MS Routing Set Definition

Prior to any discussion on using 8MS Routing Sets, it is helpful to explain what comprises an 8MS Routing Set and how it is created. From an SMS/800 perspective, an 8MS Routing Set is composed of a CAD and, optionally, a LAD and CPR. From an 8MS perspective, an 8MS Routing Set is composed of routing-affecting data and non-routing affecting data. All possible fields of an 8MS Routing Set may be seen on the **Record Management: SMS CAD** screen. The routing-affecting data includes the InterLATA Carrier, IntraLATA Carrier, Service Area, and, if specified, the POTS Termination, LAD (labels defined in EditPlan) and CPR (routing plan defined in EditPlan). All other fields on the **Record Management: SMS CAD** screen (with the exception of End Intercept Date, Due Date and Referral Option which are not stored in an 8MS Routing Set) are non-routing-affecting data. These fields do not affect how a call is routed to a carrier, but the fields are stored in an 8MS Routing Set and copied into new toll-free number records when an 8MS Routing Set is used as the source of the copy.

8MS Routing Set Creation

The creation of an 8MS Routing Set occurs in the following manner. A user enters data on the **Record Management: SMS CAD** screen. When complete, the user specifies a *Toll Free Number* and activation *Date/Time* and hits the *Send* button. The record is sent to SMS/800, where it is validated. Upon successful validation, the record is sent back to 8MS. 8MS now attempts to find an 8MS Routing Set that matches the routing-affecting data of this record. If it finds a match, it associates that 8MS Routing Set name with the toll-free number and date/time. If it fails to find a match, it creates a new 8MS Routing Set. At this point, all non-routing affecting data from this toll-free number's record are also copied into the 8MS Routing Set. The 8MS Routing Set matching/creation process also occurs every time a number is retrieved onto 8MS.

When an 8MS Routing Set is created it is given a unique name composed of the | (pipe) symbol followed by a sequence of numbers. For 8MS Routing Sets that are commonly used, a user-defined name may be assigned to an 8MS Routing Set.

Using an 8MS Routing Set

Once an 8MS Routing Set has been created, it may be the source of a **Copy Record** or **Record Management: SMS CAD** record activation. Simply select the 8MS Routing Set, provide one or more destination numbers and an activation date/time. New records will be sent to SMS/800 using all fields from the 8MS Routing Set, including the non-routing-affecting fields. If the 8MS Routing Set is selected from the **Record Management: SMS CAD** screen, the routing-affecting and non-routing-affecting data will be shown. From the **Copy Record** screen the data is used, but will not be shown.

Some customers use non-routing-affecting fields to manage their toll-free numbers, while others do not. It is up to each individual company on an 8MS platform to determine how their numbers will be managed. For example, some companies track and manage their numbers based upon the *Contact Name*, *Contact Phone* and *Notes*. Thus, it may be critical for some companies to ensure that commonly used 8MS Routing Sets contain the correct non-routing-affecting data.

Ordering 8MS Routing Sets

8MS provides a Company/User Preference that affects the order in which 8MS Routing Sets appear in all 8MS Routing Set drop-down lists. Setting the preference *MyRoutingSets* to a semi-colon separated lists of 8MS Routing Set names causes these 8MS Routing Sets to appear at the top of the drop-down list. By setting this as a Company Preference, all users will see these 8MS Routing Sets first. As with all preferences in 8MS, setting the User Preference overrides the Company Preference.

Renaming an 8MS Routing Set

If an 8MS Routing Set will be used regularly as a source in the **Copy Record** and **Record Management: SMS CAD** screens, it is suggested that the 8MS Routing Set be renamed. An 8MS Routing Set may be renamed by going to the **8MS Routing Set Management** screen.

By default only the most recently used 8MS Routing Sets will be shown in the Select 8MS Routing Set drop-down list; these are shown in recently used order. Select the blue image to the right of the list to populate the drop-down with all of your 8MS Routing Sets. The list will now be shown in alpha-numeric order. Select your 8MS Routing Set, enter the new 8MS Routing Set name in the *Rename selected 8MS Routing Set* to field and select the Save button.

Modifying Non-Routing-Affecting Data in an 8MS Routing Set

As discussed in the section **8MS Routing Set Creation**, the first time a unique set of routing is brought into 8MS (by sending a toll-free number record to SMS/800 or by retrieving a toll-free number from SMS/800), a new 8MS Routing Set is created. The non-routing-affecting data stored in the 8MS Routing Set is the set of data in that toll-free number's record. There are times when it is beneficial to modify this non-routing-affecting data (as discussed in the section **Using an 8MS Routing Set**). The **8MS Routing Set Management** screen, the same one used to renamed an 8MS Routing Set, also allows you to modify the non-routing-affecting data. This data is not updated directly by editing the 8MS Routing Set. Instead, you enter a toll-free number in the *Update CAD Info from Toll Free Number* field and select the Save button. This updates all non-routing-affecting fields in this 8MS Routing Set with the data in the current Active record of the specified toll-free number. If there is no Active record for this toll-free number the save action will fail. Note that the specified toll-free number must be in this 8MS Routing Set.

Moving 8MS Routing Sets Across 8MS Platforms

When a company is moved to a different 8MS platform or merged with another company on a different 8MS platform it is common to want the named 8MS Routing Sets (along with other data) to exist on the new 8MS platform. As described above, 8MS Routing Sets are created on-the-fly when toll-free numbers are retrieved. Thus, simply executing a retrieve of all your numbers will cause the Routing Sets to be also be created. However, since a Routing Set is an 8MS concept and structure it does not exist on the SMS/800 system. As a result of this, Routing Set names cannot be downloaded from SMS/800. Instead, a manual process is required to sync up the 8MS Routing Set names between two 8MS platforms. The process is not difficult to do but it requires each named 8MS Routing Set to be handled individually.

The process for moving a company to a new 8MS platform requires all toll-free numbers on the old platform to be retrieved onto the new platform. A number list is created on the new platform that contains all numbers on the old 8MS platform but not on the new 8MS platform. A batch retrieve request is run for the number list. When it is complete, all numbers and 8MS Routing Sets will exist on the new platform. However, the 8MS Routing Sets will contain system-generated names consisting of the | (pipe) symbol followed by a sequence

of numbers. What remains for the company to do is to name the 8MS Routing Sets and set the non-routing-affecting data if the company feels this is necessary. Below are the steps required to do this.

1. On the old 8MS platform, go to the **8MS Routing Set Management** screen and select the named 8MS Routing Set. Note the toll-free number shown in the *Update CAD Info from Toll Free Number* field.
2. On the old 8MS platform, go to the **Search Local Numbers** screen. Select the named 8MS Routing Set in the 8MS Routing Set drop-down list. (It may be necessary to select the blue image to the right of the list to populate the drop-down with all of your 8MS Routing Sets.) This will give you all numbers that currently route using this named 8MS Routing Set. Note one of these toll-free numbers.
3. On the new 8MS platform go to the **Search Local Records** screen. Enter the toll-free number found in step 2 above into the *Toll Free Number* field. Select the *Active* checkbox in the *Status* area. Select the *Retrieve* button. This will show the 8MS Routing Set for this Active record. The 8MS Routing Set will contain a system-generated name. Note the 8MS Routing Set name.
4. On the new 8MS platform go to the **8MS Routing Set Management** screen. Select the system-generated 8MS Routing Set name from the Select 8MS Routing Set drop-down list. (It may be necessary to select the blue image to the right of the list to populate the drop-down with all of your 8MS Routing Sets.) Enter the "new" 8MS Routing Set name (the original name on the old 8MS platform) into the *Rename selected 8MS Routing Set* to field. Enter the toll-free number found in step 1 above into the *Update CAD Info from Toll Free Number* field. Select the *Save* button.

These steps should be performed for each 8MS Routing Set you wish to rename. Note that in the case of a merge of data from two 8MS platforms there may be 8MS Routing Sets that already have a non-system-generated name (i.e. both companies had the same Routing Set and each had assigned a name to that Routing Set). The two companies merging their data will need to decide how to handle this since it is not possible for an 8MS Routing Set to have two names.

This document is intended as an aid to managing Resp Org Change (ROC) Requests.

ROC Definition

Toll-free numbers are reserved and managed by a **Resp Org**. However, the numbers are most often used by a Customer of Record of that Resp Org rather than the Resp Org itself. When the Customer of Record wishes to have their toll-free number managed by another Resp Org, a Resp Org Change is performed, transferring control from the current **Controlling Resp Org** to the new **Requesting Resp Org**. Prior to 2016, individual Resp Orgs would contact one another to request that control of a toll-free number be passed to a new Resp Org. Many Resp Orgs had a specific form that needed to be filled out by the Requesting Resp Org in order to ask for control of the number to be transferred. If the Requesting Resp Org did not submit the proper forms, the Controlling Resp Org would refuse to perform the Resp Org Change.

In 2016, Somos introduced a centralized Resp Org Change (ROC) Management System. This system provides all necessary functionality to manage **ROC Authorization Requests** or more simply, ROC Requests. Specifically, this system was intended to provide

1. A common, consistent set of data required for all Resp Orgs to ask for toll-free numbers
2. A long-term history of all ROC requests
3. A programmer Application Programmer Interface (API) to allow Resp Orgs to submit and manage ROC requests from their own systems
4. A web-based user interface to allow Resp Orgs to submit and manage ROC requests

To aid in understanding this tutorial, below are some common terms related to ROC. These terms and definitions are copied directly from the **Terminology** section of the User Guide.

Resp Org

A Resp Org (Responsible Organization) is an entity responsible for managing Toll-Free Numbers within a company. Each Resp Org is allowed to reserve, spare, give away or route Toll-Free Numbers.

Controlling Resp Org

In a **ROC** request, the Controlling **Resp Org** is the Resp Org that currently controls a toll-free number. A **Requesting Resp Org** asks the Controlling Resp Org to perform a Change Resp Org, granting the Requesting Resp Org control of the number.

Requesting Resp Org

In a **ROC** request, the Requesting **Resp Org** is seeking to gain control of a toll-free number. The Requesting Resp Org asks the **Controlling Resp Org** to perform a Change Resp Org, granting the Requesting Resp Org control of the number.

ROC Authorization Request

A ROC (Resp Org Change) authorization request asks the **Controlling Resp Org** of a toll-free number to port that number to a **Requesting Resp Org**, giving that Requesting Resp Org control of that number. A single request may contain one or more toll-free numbers. Numbers do not need to be under the same Controlling Resp Org. In the event that a ROC authorization request is sent to multiple Controlling Resp Orgs, when a Controlling Resp Org views the request, it may only see the numbers that are controlled by it.

A ROC Authorization Request is also known as a ROC Request. For ease of reading, in the remainder of this document, the term ROC Request will be used.

Customer of Record

A Customer of Record is the end user of a toll-free number. It is the company or person that actually receives calls on that toll-free number. The Customer of Record is the only entity that has the right to request that a number be ported from one **Resp Org** to another.

LOA

LOA is an acronym for Letter of Authorization. An LOA is a document that shows you have the right to ask a toll-free number Controlling Resp Org to port that number to your Resp Org. An LOA is meant as proof that the **Customer of Record** has requested this port.

LOA is also interpreted to mean Letter of Agency.

A ROC request contains proof that this is a valid request being performed on behalf of the toll-free **Customer of Record**. It also contains one or more toll-free numbers used by that Customer of Record. While a ROC request is treated as a single item, the numbers within that

request may be treated in different ways. It is possible for a Controlling Resp Org to approve some numbers in a request while declining other numbers. It is possible to decline some numbers in a single request for one reason and other numbers for another reason. When declining a request, a reason for the decline is required to ensure that the toll-free Customer of Record has actually asked for this Resp Org change. If the Requesting Resp Org has not offered reasonable proof, the Controlling Resp Org has the right to refuse the request. The reason tells the Requesting Resp Org what specific data is needed for this request to be processed.

The numbers within a single request do not have to be controlled by a single Resp Org, nor do the Controlling Resp Orgs need to be within a single Entity. A Controlling Resp Org receiving a ROC request is only able to view those numbers controlled by itself; it may not see numbers controlled by other Resp Orgs. Thus, a Controlling Resp Org may not see all numbers within a request. Only the Requesting Resp Org sees all numbers within a single request.

There are two types of ROC requests:

- **Incoming ROC Requests** are requests created by another Resp Org and directed at your Resp Org. These requests ask you to release toll-free numbers to the Requesting Resp Org.
- **Outgoing ROC Requests** are requests created by your Resp Org and directed at other Resp Orgs. These requests ask other Resp Orgs to release toll-free numbers to your Resp Org.

ROC requests may also be split by their processing status:

- **Open ROC Requests** are requests that have at least one number which has not been either approved or declined.
- **Closed ROC Requests** are requests for which all numbers have been either approved or declined.

8MS Advantages

While users could choose to use the Somos ROC user interface, using the 8MS user interface provides multiple advantages:

- Once logged in to 8MS, there is no need to jump to a separate system; all ROC features are fully integrated in 8MS.
- 8MS provides multiple Entity support, allowing you to view all ROC port out/port in requests across your many Entities without having to log out and log back in with a different login.
- 8MS provides a single screen to view all details of ROC requests. For a quick turn-around, this screen allows you to:
 - review all requests
 - approve or deny incoming requests
 - modify or cancel outgoing requests
- 8MS provides a single screen to create ROC requests, making it faster and easier to do so. Simply enter your number(s), Resp Org, and LOA and then send the request.
- The work-horse of 8MS, the Number List, makes for seamless port-ins, routing changes, carrier activations, and other batch functions.
- 8MS provides a user-specific history of all ROC request changes, making audit and accountability easy and more comprehensive.
- 8MS provides a comprehensive REST-based API to make ROC process integration faster and easier.
- 8MS ROC Ports are **free!** 8MS users do not get charged for ROC transactions.

ROC Capabilities in 8MS

8MS uses the ROC API to provide a comprehensive set of screens and 8MS APIs to create, view, and manage ROC requests. Both the 8MS screens and the 8MS APIs leverage existing 8MS features, especially number lists, to make creation and management of ROC requests more powerful and easier to use.

The new 8MS ROC screens and APIs provide the following capabilities:

1. The ability to submit a new ROC request using the **Submit ROC Request** screen and the **ROCNumberRequest** API call
2. The ability to retrieve and view pending and old (closed) ROC requests using the **ROC Management** screen and the **ROCRetrieveRequests**, **ROCRetrieveRequestDetail** and **ROCDownloadDocument** API calls
3. The ability to approve or decline pending incoming ROC requests using the **ROC Management** screen and the **ROCManageRequest** API call
4. The ability to remove numbers from pending outgoing ROC requests using the **ROC Management** screen and the **ROCManageRequest** API call

5. The ability to cancel pending outgoing ROC requests using the [ROC Management](#) screen and the [ROCManageRequest](#) API call
6. The ability to add additional documentation to pending outgoing ROC requests using the [ROC Management](#) screen and the [ROCUploadDocument](#) API call

Configuring 8MS for ROC

Before using the 8MS ROC screens, it is necessary to configure your 8MS account with a Somos login with ROC permissions. This is briefly described below. For specific details, refer to the [Configuring ROC Access](#) page of the User Guide. Below is a high-level description of the configuration process.

1. To begin, you must have a valid Somos login with ROC permissions. If you already have a login on Somos, you may use that one. We **strongly** recommend that you create a new login that is dedicated to use within 8MS.



Somos uses password aging when you log onto their system. Should you choose to use the same Somos login for both 8MS ROC transactions and for logging onto Somos, at some point, you will log onto the Somos web site and be forced to change your password. When this happens, you will also need to update that password on 8MS **or ROC requests from 8MS will fail**. If you have separate logins for your Somos work and for ROC, you will never have to deal with password aging, since Somos does not enforce password aging from API users.

2. Once you have confirmed that you have a valid Somos login with ROC permissions, you will need to fill in a form that gives your 8MS system permission to send ROC requests on your behalf, using your Somos login. This form is available from the 8MS system; select **Documentation** from the menu then and select the **ROC Access** link. After filling in the form, email it to 8MS Customer Support at 8mscust@iconectiv.com. The 8MS support team will send your form to Somos to process, activating your login for 8MS ROC.



Somos ROC permission is managed by Entity. For that reason, on the Somos form, you must provide one login for each Entity within your 8MS Company.

3. Once the Somos ROC access form has been processed, you will need to add your login and password to the [ROC Administration](#) screen. Saving this login and password enables 8MS to send ROC requests on your behalf.

Submitting a ROC Request

A new ROC request is generated using the [Submit ROC Request](#) screen, as shown below.

Submit ROC Request

Toll Free Number 

Number List  or 

Future Request Date

Requesting RespOrg

LOA File No file selected. No file generated.

LOA File Size

Notes

Other Documentation No files selected.

File	Size	Comments

Submitting a new request is very straight-forward. At a minimum, you need to fill in the **Requesting RespOrg** field, select an **LOA File** and provide one or more toll-free numbers using the **Toll Free Number** field, **Number List** drop-down or the  (**Dynamic List of Numbers**) button.

Optionally, you may provide notes in the **Notes** field and additional documentation using the **Other Documentation** button if you believe it necessary to aid in approval of this request. Additionally, you may schedule this request for a future date using the **Future Request Date** field. The request will reside on the Somos ROC system but will not be processed until the date is reached.

Once all fields have been filled in, select the button to send the request to Somos where it will be queued up for processing.

Viewing ROC Requests

ROC requests are viewed and managed on the **ROC Management** screen. Requests may be filtered based on various attributes of a request, as shown in the screen shot below. See the **ROC Management** User Guide page for a detailed explanation of these fields and more information on this screen.

ROC Management

Entity Toll Free Number  Type Start Date/Time

Resp Org Status Progress End Date/Time

Check Out State Checked Out By Reason

TxnID

Sort by



When filtering, only Incoming or Outgoing requests may be viewed; it is not possible to view both at the same time.

After specifying your filter criteria, select the or button to view your requests. An example list is shown below.

First		Previous 15		Records per Page 15		Set	Revert	Hide Filters	
Record(s): 16 to 30 of 33				Page 1 2 3 of 3		Next 3		Last	
Entity	Created by	Submitter Resp Org	New Resp Org	Submitted Date	Due Date	# Count			
AR	--	ART01	ART34	03/28/17 01:58P	03/30/17 01:58P	1			
AR	--	ART01	ART34	03/28/17 01:58P	03/30/17 01:58P	1			
AR	--	ART01	ART34	03/28/17 01:56P	03/30/17 01:56P	1			
AR	--	ART01	ART34	03/28/17 01:56P	03/30/17 01:56P	1			
H AR	gaf	ART01	ART01	03/28/17 12:05P	03/30/17 12:05P	1			
H AR	gaf	ART01	ART01	03/28/17 10:16A	03/30/17 10:16A	4			
AR	--	ART01	ART01	03/28/17 10:12A	03/30/17 10:12A	2			
AR	--	ART01	ART01	03/28/17 10:04A	03/30/17 10:04A	3			

This list shows a few attributes of the request itself, plus a count of the toll-free numbers in this request. Selecting one of the rows in this list will populate the detail portion of this screen, as shown below:

Submitter Name:Steve-YH Levinn
Submitter Phone:732-302-0222
Submitter Resp Org:YHN01
New Resp Org:YHN02

Submitter Company:theBestNumbers.com
Submitter Email:roc@csfcorp.com
Submitted Date:11/06/18 08:51A
Due Date:11/08/18 08:51A

LOA Document: [Gimmie da numba.pdf](#)
Notes:
Other Documentation:

	Dialed #	Processed Date/Time	Controlling Resp Org	Status	Reason	Notes
☐	844-822-2945		ART19	Pending		

As noted above, you may only view one type of request at a time, so the set of buttons available in the detail of a request will change depending on whether you're viewing an incoming request or an outgoing one. The screen shown above is the detail for an Incoming request. Below is the detail for an Outgoing request. Note the difference in what buttons are available.

Submitter Name:Steve-YH Levinn
Submitter Phone:732-302-0222
Submitter Resp Org:YHN01
New Resp Org:YHN02

Submitter Company:theBestNumbers.com
Submitter Email:roc@csfcorp.com
Submitted Date:11/06/18 08:59A
Due Date:11/08/18 08:59A

LOA Document: [Gimmie da numba.pdf](#)
Notes:
Other Documentation:

	Dialed #	Processed Date/Time	Controlling Resp Org	Status	Reason	Notes
☐	844-822-2945		ART19	Pending		

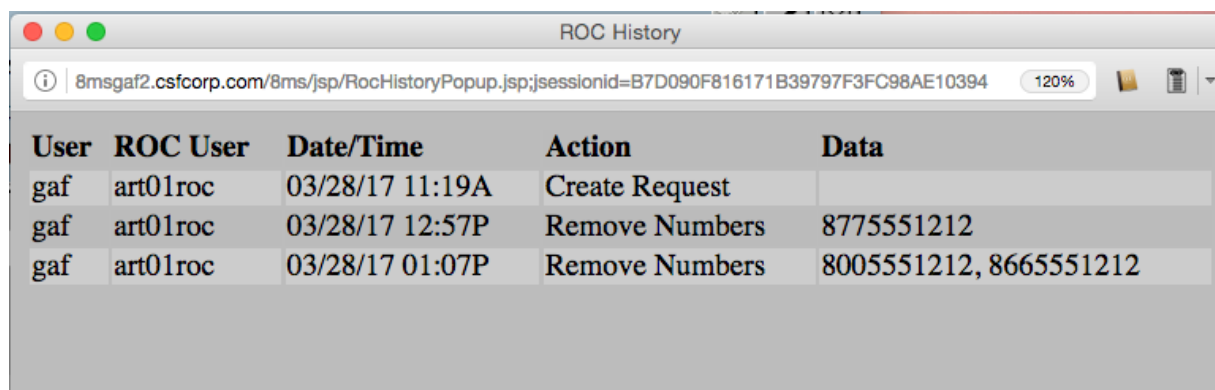
ROC Request History

To view changes made to a ROC request made by 8MS users, you may use the standard way of viewing 8MS activity, via the [Activity Log](#). In addition to this, each item shown in the list above may have additional activity logging. If there is additional logging, a (ROC History) button will appear on the far left of the list of requests.



ROC History will only be available if an 8MS user made the request on this platform. It will not show activity by users on the Somos ROC platform, nor will it show activity by the other Resp Org company.

To view this additional history, click on the ROC History button and a popup will appear with the history of this ROC request, as shown in the example below.



The screenshot shows a web browser window titled "ROC History". The address bar displays the URL: 8msgaf2.csfcorp.com/8ms/jsp/RocHistoryPopup.jsp;sessionId=B7D090F816171B39797F3FC98AE10394. The page contains a table with the following data:

User	ROC User	Date/Time	Action	Data
gaf	art01roc	03/28/17 11:19A	Create Request	
gaf	art01roc	03/28/17 12:57P	Remove Numbers	8775551212
gaf	art01roc	03/28/17 01:07P	Remove Numbers	8005551212, 8665551212

Managing a ROC Request

Operations on incoming ROC requests include:

- Approving a request, which releases toll-free numbers to the Requesting Resp Org.



When Somos approves a request, it also sends a Change RespOrg request to SMS/800, so the approving RespOrg does not need to do this.

- Pending Approve of a request, which tells Somos to release the toll-free numbers to the Requesting Resp Org when the Due Date of the ROC request is reached. The Due Date is determined by Somos. At the time this tutorial is being written, Somos sets the Due Date to 48 hours from the time the request was submitted, although this may be changed at the discretion of Somos.
- Cancel Pending Approve of a request, which tells Somos to delete a previously submitted Pending Approve.
- Declining a request, which tells the Resp Org you are refusing to turn over toll-free numbers to the Requesting Resp Org. This is normally only done if the Requesting Resp Org has not provided sufficient proof that the end-user of the toll-free number is asking for this change.

To approve or decline numbers, identify the numbers by selecting the checkboxes to the left of each number, then select one of the action buttons on the right side of the detail screen.

Operations on outgoing ROC requests include

- Removing toll-free numbers from a ROC request.
- Canceling a request.
- Adding additional documentation to a request, probably because the Controlling Resp Org wanted additional proof that this was a valid request.

To remove numbers from a request, identify the numbers by selecting the checkboxes to the left of each number, then select the **Remove** button on the right side of the detail portion of the screen.



The Somos ROC System does not actually remove numbers from a request. Instead, it marks those numbers as Declined, with a Reason of *Auto-rejected by Submitter*.

To completely cancel a request, select the **Cancel** button on the right side of the detail portion of the screen. This is equivalent to selecting all the numbers in this request and selecting the **Remove** button.

To add one or more documents to a request, select the **Add Document...** button to the right of the **Other Documentation** label.

This document describes the steps required to configure an 8MS customer for the **ROC** feature.

8MS Customer

1. The 8MS customer must have a Somos login with ROC permission. If you already such a login, you may use that login. If your login does not have ROC permission, you may have ROC permission added to that login. However, we **strongly recommend** that you do not use that login and instead **create a new login** that is dedicated to use within 8MS.



Somos uses password aging when you log onto their system. Should you choose to use the same Somos login for both 8MS ROC transactions and for logging onto Somos, at some point you will log onto the Somos web site and be forced to change your password. When this happens, you will also need to update that password on 8MS **or ROC requests from 8MS will fail**. If you have separate logins for your Somos work and for 8MS ROC API, you will never have to deal with password aging, since Somos does not enforce password aging from API users.

By convention we recommend that you use your '01' Resp Org followed by 'ROC'. For example

Entity AR

Resp Org ART01

Somos Login ART01ROC

2. You can download the ROC Access form from the 8MS User Interface. Go to the Documentation page and select the **ROC Access** link. Download the pdf, print it and follow the instructions below on how to fill it in. You must fill in one form for each Entity in your Somos company.
 1. Check the *Request Access* checkbox.
 2. Enter your initials in the field labeled *Initial here to change one or more specific User IDs with ROC Access Permissions for your Entity*.
 3. In the section labeled *User IDs* you may enter your User ID for this Entity in the field labeled *List the existing Somos User IDs below* but, again, we strongly recommend that you do not use existing Somos logins.
 4. In the section labeled *User Information* fill in your *Resp Org ID* and other contact information. For the *User ID* field, as noted above, we strongly recommend that you use the string **ROC** rather than your initials.
 5. On the bottom of the form, enter values for the fields: *Authorized Person's Wet Signature*, *Authorized Person's Printed Name*, *Company Name*, *Email*, and *Date*.

3. Email the form to 8mscust@iconectiv.com CSF will forward this on to Somos. If you use the *User Information* section of the form to request a new id, Somos will email you when the new id has been created. That email will include a temporary password. You should log in to Somos with this id and immediately change your password. You are now ready to configure 8MS ROC with that new login and password.
4. Add your SMS/800 login to 8MS to enable ROC requests.



The following step should only be done after the 8MS Support Team has submitted the form to Somos and the Somos help desk has processed the form.

From the 8MS User Interface, under the **System Admin** menu, go to the **ROC Admin** screen.

Enter the SMS/800 user id and password next to the appropriate Entity and select the **Update** button. Your login and encrypted password will be saved. To verify that your login and password are valid and activated at Somos, click the *Verify All Saved Credentials* button at the bottom of the screen. This will send a ROC message to Somos. If the login is not activated or the password is incorrect, an error message will be displayed.

8MS Support Team

1. Upon receiving the scanned document, submit a special request to Somos.
 1. Log in to portal.somos.com
 2. Select **Submit Requests**, then **Special Request**
 3. Enter a description like *'Please add ROC API access for the entity XX. See the attached form.*
 4. Select **Continue** and attach the scanned form.
 5. Select the **Submit** link.
2. The SMS/800 help desk will call back when the form has been processed in 1-2 business days. Upon receiving the call, ROC access should now be working from 8MS.

This document is intended as an aid to cleaning up invalid NPA-NXX combinations in a **CPR**.

Introduction

Due to the rapid consumption of NPA-NXXs, especially for cellular service, new NPAs are constantly being introduced to the telephony network. This often results in an **NPA Overlay or Split**. As a result of this, NPA-NXX combinations that were valid on one day may become invalid the next day, because a split or overlay has moved the NXX to a new NPA.

For 8MS users that use NPA-NXX routing within a CPR, it is possible for a CPR to be valid and working in the telephony network and then suddenly, after a split or overlay has occurred, the CPR is invalid. Active toll-free numbers will continue to process calls correctly in the **SCPs**. However, if a user attempts to change the routing of an existing toll-free number or add a new number that uses this routing, SMS/800 validation will fail when attempting to activate the number. This is true for both **CAD** records in **8MS Routing Sets** and **PAD** records in **SMS Templates**. If you attempt to point an additional number at an existing 8MS Routing Set or an Active Template, via **Copy Record**, **Record Management: SMS CAD** or **Record Management: SMS PAD** and the record has invalid NPA-NXXs, the transaction will fail. Typically, you will see an error message like the following.

```
800-xxx-xxxx: Customer record updated (03/31/16 09:15A/C) .
Record failed validation but was stored at SMS/800.
Pointer is invalid due to Template's CPR/LAD has invalid
data. You will need to fix and update the Template Record and
then re-update the Pointer Record. (E4549)
Context: POINTER IS INVALID DUE TO TEMPLATE RECORD HAS
INVALID DATA.
```

To fix this problem, it is necessary to remove any invalid NPA-NXX values referenced in the CPR. Fortunately, 8MS knows all valid NPA-NXX pairs so it can assist in finding the offending values. Most often these values will be found as the content of one or more labels. It is also possible that the invalid values will be found directly on a branch; either on an *NXX*, *SixDigit* or a *TenDigit* node. Depending on whether you're working with an SMS Template or an 8MS Routing Set, you'll follow the instructions in one of the sections shown below.

- **Fixing an SMS Template**
- **Fixing an 8MS Routing Set**

Fixing an SMS Template



SMS Templates may be confusing if you have not worked with them before. If you are not familiar with SMS Templates, it is highly recommended that you read the tutorial on **Managing SMS Templates** and the **SMS Template** definition in the **Terminology** section of the user guide.

Selecting the SMS Template

Go to the **SMS Template Management** screen and select the desired **SMS Template**. You should see something like the following.





SMS Template Management

Select

SMS Template 

8MS Routing Set

Toll Free Number 

Date/Time 

Schedule

SMS Template 

(select or enter)

Date/Time

☐ High Priority

Routing Information 

InterLATA Carrier 

IntraLATA Carrier 

Complex Record  or enter new plan name

Notes 

Description 

Approval: NR

Schedule Status: Active

Contact Name 

Contact Phone 

Resp Org

Lines 

Service Area 

Network ☐ US ☐ XA ☐ XB ☒ XC

State

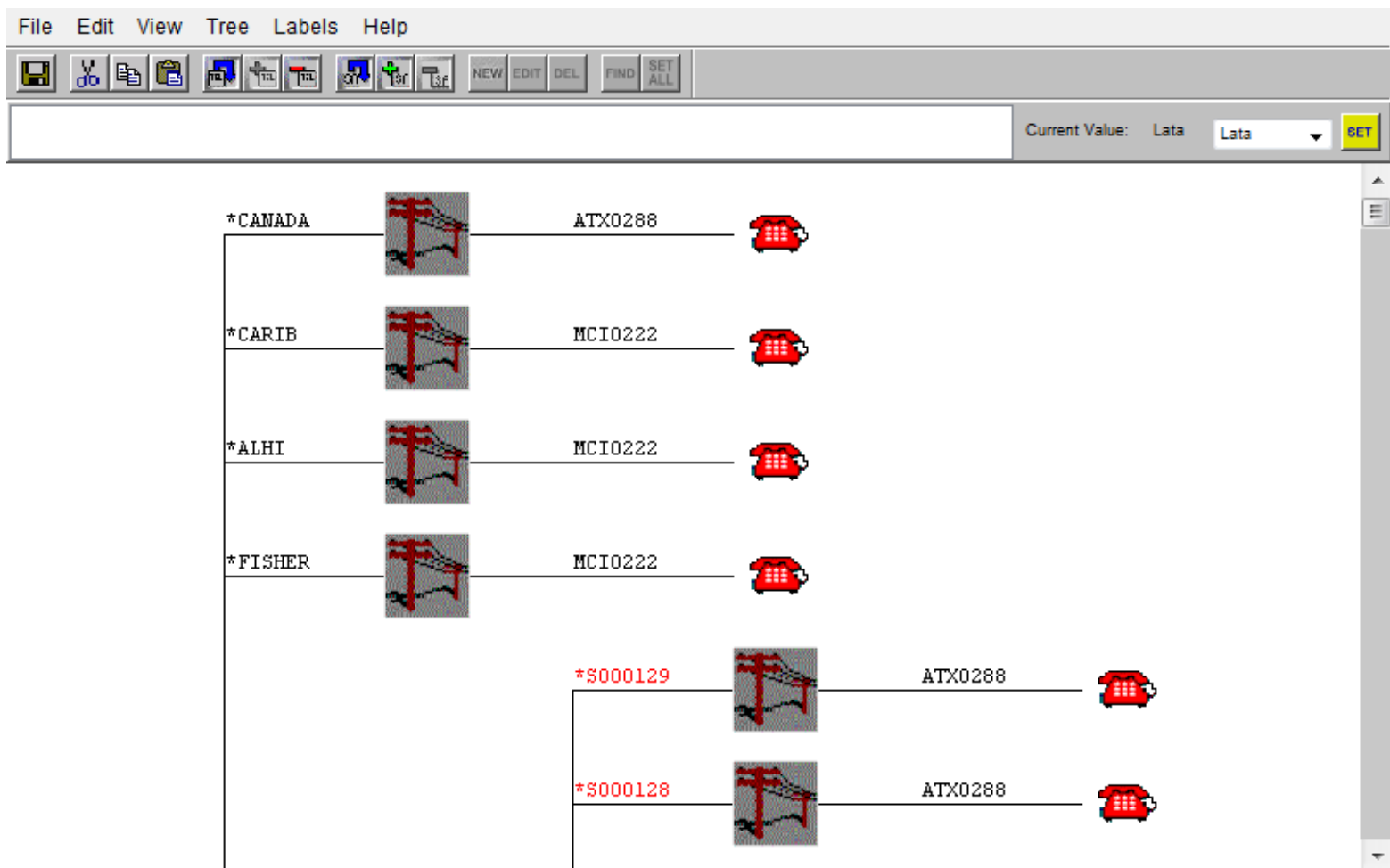
Area Code

LATA

Labels

Opening the CPR

Now click on the **Edit Plan** button to the right of the **Complex Record** field. You will probably need to accept several Java warning messages and then EditPlan should appear.



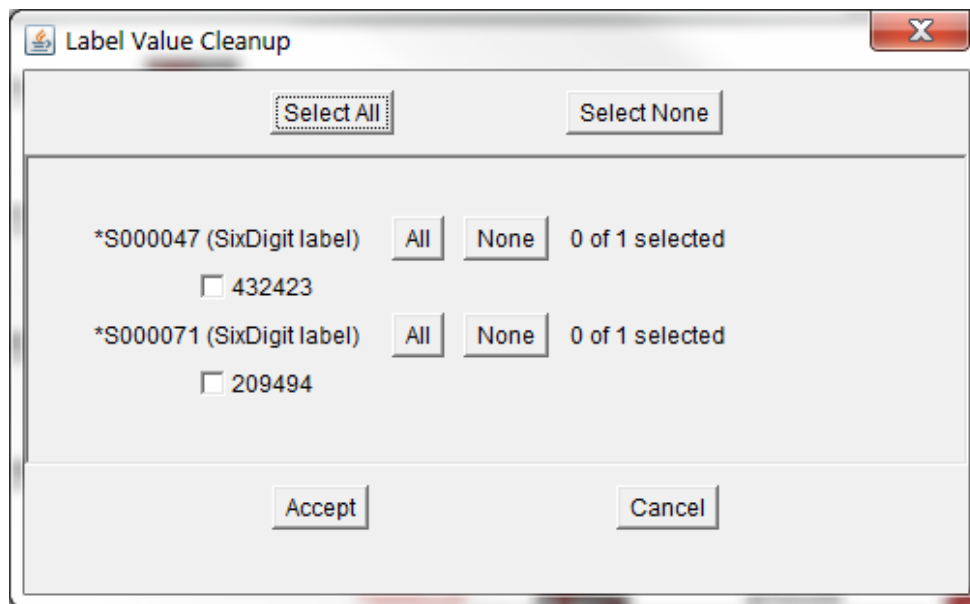
EditPlan is implemented as a Java Applet. There are limitations in running Java Applets within browsers. To see details on browser and applet support, please refer to the following FAQ questions and answers:



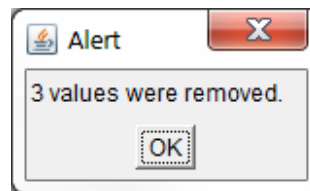
- **What web browsers are currently supported?**
- **How do I need to configure my browser to use 8MS?**
- **Why can't I get EditPlan to run?**

Cleaning Labels

From the **Labels** menu on EditPlan, click on the **Cleanup Label Values** button. The following popup will appear.



Click on the **Select All** button and the checkboxes for all invalid values will be selected. Now click on the **Accept** button. A popup will appear indicating the number of invalid values that have been removed.



Cleaning Branches

In the event that the problem is with a branch value rather than a label, you will see an SMS/800 validation error like the following.

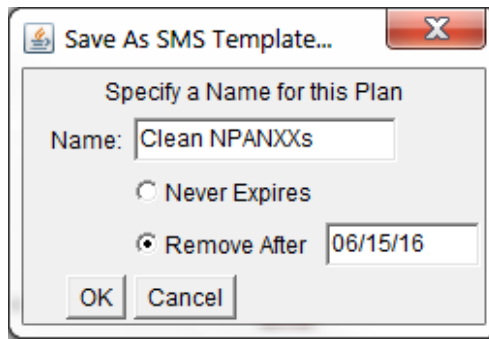
```
*AR-STANDARD: Change failed validation.
vr.c or def (6-digit, 10-digit, Tel): The 6-digit (NPANXX)
combination must be known to SMS, like 908699. (E1107)
Context: BAD:432423
```

In cases such as this, you must find the branch or branches that contains this branch value and remove or correct it. Currently, EditPlan has no find feature for branch values. To work around this, since you know the error is limited to *NXX*, *SixDigit* and *TenDigit* nodes, you will need to scan your CPR for any of these nodes and check the branches for the invalid value.

One workaround for the lack of a *find branch value* feature is to generate a pdf document using the **View** button and use the pdf viewer *find* feature. Search the pdf for the invalid value. Once you have identified the location of the branch, you may then navigate to that branch in EditPlan and remove or correct it.

Saving the Local SMS Template CPR

Click on the EditPlan **File** menu, then the **Save As** menu and finally click on the **Save as SMS Template Plan** button.



Enter a new local plan name in the **Name** field and click on **OK**.



It is at the user's discretion whether or not the local CPR be set to expired. The 8MS support team suggested that the **Remove After** field be left with it's default, which will cause the CPR to be removed after a suitable amount of time. This plan will serve no purpose once the CPR has been sent up to SMS/800 with the SMS Template.

Click on the EditPlan **File** menu, then the **Quit** button to exit EditPlan. You should now be back at the **Template Management** screen.

Updating the SMS Template

Now that the CPR has had all invalid values removed from it, you will need to update the SMS Template with this modified CPR. To do this you will select the new local CPR from the **Complex Record** drop-down list.

Click on the **Refresh** button on the upper right. This will cause the **Template Management** screen to repopulate the **Complex Record** list with the newly created local CPR.

SMS Template Management

Select

SMS Template

8MS Routing Set

Toll Free Number

Date/Time

Schedule

SMS Template

(select or enter)

Date/Time

☐ High Priority

Routing Information

InterLATA Carrier

IntraLATA Carrier

Complex Record or enter new plan name

Notes

Description

Approval: NR

Schedule Status: Active

Contact Name

Contact Phone

Resp Org

Lines

Service Area

Network ☐ US ☐ XA ☐ XB ☒ XC

State

Area Code

LATA

Labels

Select the newly created **Complex Record** and click on the **Send** button to update the SMS Template at SMS/800.

After the new SMS Template record has become **Active**, use **Copy Record** to point your toll-free number(s) at this SMS Template.

This completes the process for removing invalid NPA-NXXs in an SMS Template.

Fixing an 8MS Routing Set

An **8MS Routing Set** is created by the 8MS system when a new, unique routing (**CAD**, **LAD**, and **CPR**) is encountered after successfully sending that routing to SMS/800. Users may never explicitly create an 8MS Routing Set; it is only the system that creates 8MS Routing Sets. Once created, an 8MS Routing Set may never be modified. However, it is possible to open the routing of an 8MS Routing Set, modify it and send the modified routing up to SMS/800 with a toll-free number. If this new routing is unique, a new 8MS Routing Set will be created and will be associated with this toll-free number.



8MS Routing Sets may be confusing if you have not worked with them before. If you are not familiar with 8MS Routing Sets, it is highly recommended that you read the tutorial on **Managing 8MS Routing Sets** and the **8MS Routing Sets** definition in the **Terminology** section of the user guide.

The process for fixing an 8MS Routing Set with invalid NPA-NXXs is very similar to the process for fixing an SMS Template. The process deviates significantly when saving the 8MS Routing Set.

Selecting the 8MS Routing Set

Go to the **Record Management: SMS CAD** screen and select a toll-free number in the desired **8MS Routing Set**. You should see something like the following.

Record Management

SMS CAD | SMS PAD | 8MS TeXT | Verizon 0222 | Global Crossing | AT&T | Impact Tel

Select

SMS Template

8MS Routing Set

Toll Free Number 833-795-6380

Date/Time 05/17/16 06:45A Active

Schedule

Toll Free Number 8337956380

Date/Time NOW

☐ High Priority

Send Send Batch View Refresh

RespOrg: ART19 Approval: NR

Number Status: Working (05/17/16) Active 8MS Routing Set/SMS Template: 000000664

Schedule Status: Active Schedule 8MS Routing Set/SMS Template: 000000664

Number Information

InterLATA Carrier MCI-0222

IntraLATA Carrier MCI-0222

Order Number GAF123

Complex Record 05/17/16-06:45A or enter new plan name

Notes

Due Date 05/17/16

RAO 000

Customer

TelCo ART1

InterLATA POTS ☐

POTS Termination

SF Number

Hold ☐

Bill to Number 0000000000

Agent

IC/EC Billing

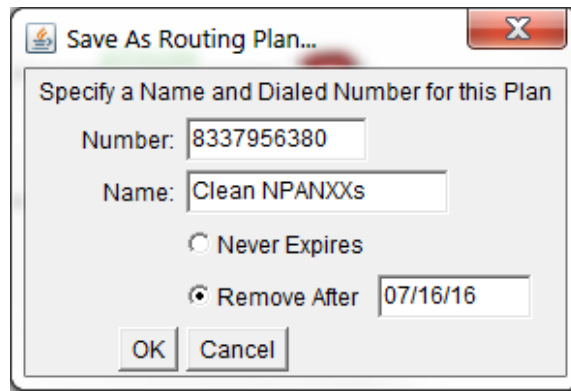
The steps for modifying the CPR are identical to the process described above in the SMS Template section. The similarities end when you come to the section on *Saving the Local SMS Template Cpr*, so do not follow that step or any beyond it.

To make this process easy to follow, click on each of the links below. They will direct you to the appropriate sections above. When you have completed those steps, return here.

- [Opening the CPR](#)
- [Cleaning Labels](#)
- [Cleaning Branches](#)

Saving the Local 8MS Routing Set CPR

Click on the EditPlan **File** menu, then the **Save As** menu and finally click on the **Save as Dialed Number Plan** button.



Enter a new local plan name in the **Name** field and click on **OK**.



It is at the user's discretion whether or not the local CPR be set to expired. The 8MS support team suggested that the **Remove After** field be left with it's default, which will cause the CPR to be removed after a suitable amount of time. This plan will serve no purpose once the CPR has been sent up to SMS/800 with the Toll-Free Number.

Click on the EditPlan **File** menu, then the **Quit** button to exit EditPlan. You should now be back at the **Record Management: SMS CAD** screen.

Updating the Toll-Free Number

Now that the CPR has had all invalid values removed from it, you will need to send this modified CPR and all associated CAD data to SMS/800. To do this you will select the new local CPR from the **Complex Record** drop-down list.

Click on the **Refresh** button on the upper right. This will cause the **Record Management: SMS CAD** screen to repopulate the **Complex Record** list with the newly created local CPR.

Record Management					
SMS CAD	SMS PAD	8MS TeXT	Verizon 0222	Global Crossing	AT&T
Select SMS Template 8MS Routing Set Toll Free Number 833-795-6380 Date/Time 05/17/16 06:45A Active Schedule Toll Free Number 8337956380 Date/Time NOW ☐ High Priority Send Send Batch View Refresh					
RespOrg: ART19 Number Status: Working (05/17/16) Schedule Status: Active			Approval: NR Active 8MS Routing Set/SMS Template: 000000664 Schedule 8MS Routing Set/SMS Template: 000000664		
Number Information InterLATA Carrier MCI-0222 IntraLATA Carrier MCI-0222 Order Number GAF123 Complex Record 05/17/16-06:45A or enter new plan name Notes Due Date 05/17/16 RAO 000 Customer TelCo ART1 InterLATA POTS ☐ POTS Termination SF Number Edit Plan Termination Lines Hold ☐ Bill to Number 0000000000 Agent IC/EC Billing					

Select the newly created **Complex Record** and click on the **Send** button to update the toll-free number record at SMS/800.

Record Management

SMS CAD | SMS PAD | 8MS TeXT | Verizon 0222 | Global Crossing | AT&T | Impact Tel

Select

SMS Template

8MS Routing Set

Toll Free Number 833-795-6380

Date/Time 05/17/16 06:45A Active

Schedule

Toll Free Number 8337956380

Date/Time NOW

☐ High Priority

RespOrg: ART19

Number Status: Working (05/17/16)

Schedule Status: Active

Approval: NR

Active 8MS Routing Set/SMS Template: |000000664

Schedule 8MS Routing Set/SMS Template: |000000664

Number Information

InterLATA Carrier MCI-0222

IntraLATA Carrier MCI-0222

Order Number GAF123

Complex Record or enter new plan name

Notes

Due Date 05/17/16

RAO 000

Customer

TelCo ART1

InterLATA POTS ☐

POTS Termination

SF Number

Hold ☐

Bill to Number 0000000000

Agent

IC/EC Billing

After the new toll-free number record has become **Active** it is likely that a new 8MS Routing Set has been created; this is the 8MS Routing Set associated with this toll-free number. The name of this 8MS Routing Set will be a system-generated name consisting of the | (pipe) symbol followed by a sequence of numbers. The middle area of the **Record Management: SMS CAD** screen will show this system-generated name to the right of the **Active 8MS Routing Set/SMS Template** label. Note this name as you will need it if you are going to rename this 8MS Routing Set.

Date/Time 05/17/16 06:45A Active

RespOrg: ART19

Number Status: Working (05/17/16)

Schedule Status: Active

Approval: NR

Active 8MS Routing Set/SMS Template: |000000664

Schedule 8MS Routing Set/SMS Template: |000000664

Keep in mind that a new 8MS Routing Set has been created. It is this 8MS Routing Set that has had the invalid NPA-NXXs removed. **Be aware that the old 8MS Routing Set has not been modified and is invalid!**

Renaming the New 8MS Routing Set

It is possible to rename the new 8MS Routing Set to the old name, but this should be done with discretion.

The process of naming a new 8MS Routing Set to a name already in use requires changing the name of the old 8MS Routing Set as well. This means that any toll-free numbers that use the old version of this 8MS



Routing Set will now reference the changed name and will still contain the invalid NPA-NXXs. It is suggested that all these toll-free numbers should be updated to use the new 8MS Routing Set.

An 8MS Routing Set may be renamed by going to the **8MS Routing Set Management** screen. You should see something like the following.

By default only the most recently used 8MS Routing Sets will be shown in the **Select 8MS Routing Set** drop-down list; these are shown in recently used order. Select the blue image to the right of the list to populate the drop-down with all of your 8MS Routing Sets. The list will now be shown in alpha-numeric order.

Select the old 8MS Routing Set and enter a new name in the *Rename selected 8MS Routing Set* field. It is suggested that you name it using the old name followed by the string "OLD". For example, if the old name was *Standard ATT* then rename this to *Standard ATT OLD*. When viewing your 8MS Routing Sets, this should then appear just below the new version.

Click on the *Save* button and the change will be saved; the old 8MS Routing Set will now have a new name.

Now repeat this process for the newly created 8MS Routing Set. From the **Select 8MS Routing Set** drop-down list select the system-generated name. Enter the new name in the *Rename selected 8MS Routing Set* field. Click on the *Save* button and the change will be saved; the new 8MS Routing Set will now have the original name and the old 8MS Routing Set will have the modified name. At your company's discretion, you may update all other toll-free numbers that currently point at the old 8MS Routing Set.

This completes the process for removing invalid NPA-NXXs in an 8MS Routing Set.

This section of the user guide defines terms and values necessary to understand 8MS, the 8MS user interface and the SMS/800 Toll-Free service.

Select a letter to quickly jump to terms beginning with that letter.

8 A B C D E F H I L M N O P R S T U W

8

8MS

8MS is a system that interfaces with

- **SMS/800** to reserve toll-free numbers and provision routing to deliver calls to one or more carriers
- **Carrier Express** to provision routing on carriers to deliver calls to the final destination(s) within that carrier

8MS Company

A company that has access to the **8MS** system. An 8MS Company has one or more **SMS/800 RespOrgs**. This company has signed agreements with both CSF Corporation and SMS/800 that grant 8MS access to the RespOrg toll-free number data.

8MS Routing Set

An 8MS Routing Set is a collection of **CAD**, **LAD**, and **CPR** data associated with a single Toll-Free Number **Record**.

8MS Routing Sets are automatically created. When a new Toll-Free Number CAD Record is created, 8MS analyzes on the record. If an 8MS Routing Set already exists that matches this Record, then the Toll-Free Number Record is associated with the existing 8MS Routing Set. If an 8MS Routing Set is not found that matches this Record, then a new 8MS Routing Set is created and this Record is associated with that new 8MS Routing Set. Thus, 8MS Routing Sets are not explicitly created in 8MS; they are created by activating a record in **SMS/800**.

When an 8MS Routing Set is created, it is given a system-defined name consisting of a vertical bar (|) symbol followed by a series of digits, for example |000058362. 8MS Routing Set names can be changed using the **8MS Routing Set Mgmt** screen, allowing users to give their 8MS Routing Sets more meaningful names.

An 8MS Routing Set can be used as the **Source** or **Destination** of a **Copy Record** or other **Batch** operation. The routing associated with the selected 8MS Routing Set is copied to the destination number or numbers. An 8MS Routing Set can also be used for populating the **Record Management: SMS CAD**, **Record Management: SMS PAD**, or **SMS Template Management** screens when creating a new Record.

8MS Routing Sets also provide a user-friendly way to identify how a set of Toll-Free Numbers

are routing, using the **Search Local Records** screen.

See Also

- **SMS Template, Source, Destination**

Related User Guide Sections

- **Managing 8MS Routing Sets**
- **Record Management, SMS Template Management, Copy Record**
- **Search Local Records**
- **8MS Routing Set Mgmt, 8MS Routing Set Info**

8MS User

A user that has access to the 8MS system. 8MS Users always belong to an **8MS Company**.

A

Active

The state of a **Record** that has been loaded on one or more **SCP**'s (i.e., processing calls).

API

An API (Application Programmer Interface) is a library of code that allows programmers to interface with a computer system without needing knowledge of the internals of that system.

See Also

- **MGI**
- **Registry API**

AOS

See **Service Area**. Also known as an Area of Service.

Area Of Service

See **Service Area**. Also known as an AOS.

Assigned

The state of a newly **Reserved** number that has a **Pending** record but is not yet active in any **SCP** (i.e., calls are not yet being processed).

B

Batch

A Batch is an operation performed on a set of Toll-Free Numbers rather than a single number. Batch operations are scheduled and normally run sequentially. Batch progress can be monitored

in the **Batch Log**. Results of batch operations are viewed in the **Activity Log**.

The set of numbers targeted for a Batch operation is known as the **Destination**.

See Also

- **Response Frame**

Related User Guide Sections

- **Number Lists, Batches, Batch Log, Activity Log**

BR Template

SMS Templates are owned by an **Entity** and cannot be shared across Entities. If a toll-free number is routed on an SMS Template, when control of that number is transferred to a Resp Org outside that Entity, Somos copies the SMS Template and renames it with the string "BR" immediately following the Entity in the SMS Template name (i.e. *AR-GAF becomes *ARBR-GAF).

Each Entity has a limited number of SMS Templates they may create. BR Templates are not counted as part of that number.

Branch

A Branch is one possible outcome of a **Node** in a **CPR**. The contents of a Branch may be one or more values or it may be a **Label**.

C

CAD

A CAD (Customer Administrative Data) record is a Toll-Free Number record that contains both routing and administrative data. CAD records are scheduled to go active on a specified date and time. A CAD record remains in effect until another CAD record replaces it or the Toll-Free Number enters the **Disconnected** state.

See Also

- **LAD, CPR**
- **PAD, TAD**

Related User Guide Sections

- **Record Management**
- **Search Local Records**

Carrier Express

Carrier Express is a system that interfaces with carriers and uses each carrier's **API** to activate and disconnect toll-free numbers, allowing 8MS to load data onto the global telephony network and the individual carriers' networks.

Closed ROC Authorization Request

A Closed ROC Authorization Request is one in which all toll-free numbers have been processed; that is, there are no numbers that have not been approved or denied.

Controlling Resp Org

In a **ROC** request, the Controlling **Resp Org** is the Resp Org that currently controls a toll-free number. A **Requesting Resp Org** asks the Controlling Resp Org to perform a Change Resp Org, granting the Requesting Resp Org control of the number.

CPR

A CPR (Call Processing Record) contains a set of advanced routing features that define how to route a call to one or more carriers.

On 8MS, a CPR is associated with a **CAD** on the **Record Management: SMS CAD** screen. Alternate names for a CPR are *Routing Plan* and *Complex Record*.

Related User Guide Sections

- **Record Management, SMS Template Management**
- **CPR Management, SMS Template CPR Management**

Customer of Record

A Customer of Record is the end user of a toll-free number. It is the company or person that actually receives calls on that toll-free number. The Customer of Record is the only entity that has the right to request that a number be ported from one **Resp Org** to another.

See Also

- **ROC, ROC Authorization Request**

D

Destination

Destination Number or Destination Numbers, is a set of Toll-Free Numbers used as the target of a **Batch** operation. A Destination is selected from any of the following:

- **8MS Routing Set**
- **SMS Template**
- **Number List**
- **Dynamic List of Numbers**

Disconnect

A **Record** in the **Pending** state that will take a number out of service. A Disconnect record causes a number to enter the **Disconnected** state.

Disconnected

A Toll-Free Number state indicating that the number is owned by a **Resp Org** but is not processing calls. Upon entering the Disconnected state, a number is on **Intercept** and remains so until the the number's **End Intercept Date** is reached. A number enters the Disconnected state when a **Disconnect** record goes active.

Dynamic List of Numbers

A Dynamic List of Numbers is a set of numbers not associated with a **Number List**. Instead, this set of numbers is created on-the-fly, by either typing or pasting numbers into a **Numbers** text area on any screen.

E

Effective Date/Time

An Effective Date/Time is the date and time when a a Toll-Free Number or SMS Template **Record** will go from the **Pending** state to the **Active** state.

End Intercept Date

The date when a Toll-Free Number is moved from the **Disconnected** state to the **Transitional** state.

Related User Guide Sections

- **Disconnect**

Entity

An SMS/800 Entity is a unique organization within the SMS/800 system. It is defined by a distinct two character string and contains one or more **Resp Orgs** under that Entity. All Resp Orgs within an Entity will begin with the same distinct two character string.

F

Failed

The state of a **Record** that has not been activated.

H

Hold

The state of a **Record** that was in the **Pending** state but has been marked by the **RespOrg** so that it will not go active when it reaches its **Effective Date/Time**. Only Toll-Free Number **Records** may be put into the Hold state; **SMS Templates** may not be put on Hold.

Incoming ROC Authorization Request

An Incoming ROC Authorization Request is one sent from another Resp Org to your Resp Org, asking you to port a number to the requesting Resp Org. An incoming ROC authorization request may be modified in one of the following ways:

- approve one or more toll-free numbers in the request, which port the toll-free number(s) to the requesting Resp Org
- deny one or more toll-free numbers in the request, which prevents the port of those numbers

Invalid

The state of a **Record** that has failed validation on **SMS/800**.

Intercept

When a number enters the **Disconnected** state, it is no longer routing calls. When the number is dialed, an Intercept announcement is played that informs the caller that the call cannot be completed as dialed. A number stays on Intercept until the number enters the **Transitional** state.

Label

A Label is a set of **Branch** values in a **CPR** with a **Node** type and a name associated with it. A collection of Labels associated with a single Toll-Free Number **Record** is called a **LAD**.

A **Branch** has a limited length, allowing only a few values to be stored directly on a branch. When the contents of a Branch will exceed the maximum length of the Branch, the Branch contents are stored in a Label and the Label name is shown on the Branch.

LAD

A LAD (Label Administrative Data) record is a collection of **Labels** associated with a particular Toll-Free Number **Record**. The set of Labels in a LAD are used by a **CPR**.

See Also

- **Branch, Label**
- **CAD, CPR**

Related User Guide Sections

- **Record Management, SMS Template Management**

LOA

LOA is an acronym for Letter of Authorization. An LOA is a document that shows you have the right to ask a toll-free number controlling Resp Org to port that number to your Resp Org. An

LOA is meant as proof that the **Customer of Record** has requested this port.

LOA is also interpreted to mean Letter of Agency.

See Also

- [ROC, ROC Authorization Request](#)

Related User Guide Sections

- [ROC Submit Request](#)

Local Data

Local Data is **SMS/800** data that is stored on 8MS. This Local Data is kept up-to-date via **Unsolicited Messages** from SMS/800.

Related User Guide Sections

- [Delete Local](#)
- [Retrieve, Retrieve SMS Template](#)
- [Search Local Numbers](#), [Search Local Records](#), [Search Local CarExp](#), [Search Local Templates](#)

M

MGI

MGI (Mechanized Generic Interface) is a programming **API** that interfaces with **SMS/800** for provisioning toll-free service. The MGI is one of the APIs that 8MS uses to communicate with SMS/800.

Beginning with 8MS 17.1, 8MS is capable of using either the **Registry API** or the MGI.

See Also

- [Registry API](#)

Related User Guide Sections

- [SMS Message Status](#)

MMS Message

MMS, an acronym for Multimedia Message Service, is the term used for a text message which may contain images or videos along with text.

See Also

- [SMS Message](#)

Must Check

The state of a **Record** for a number that has had another **Pending** record with an earlier Date/Time inserted, modified or deleted. A Must Check record must be re-validated prior to reaching its **Effective Date/Time** or it will become a **Failed** record.

N

Number List

A Number List is a set of **Numbers** with a name associated with it. While there does not need to be any relationship between the numbers, typically number lists are created to manipulate the set of numbers in some common way. Each Number List has an expiration date associated with it; when that date is reached, the Number List is deleted. If the expiration date is not set, a Number List will never be deleted.

A Number List can be used as the **Destination** of a **Copy Record** or other **Batch** operation.

Related User Guide Sections

- **Number Lists, Batches**

Node

A Node is a decision point in a **CPR**. Most Nodes have one or more **Branches** coming out of them. Other Nodes, known as final-handling Nodes, do not allow Branches and signify an end-point in a call.

Number Status

Every Toll-Free Number has a Number Status that indicates the current state of a number. Number Status values include:

- **Spare**
- **Unavailable**
- **Reserved**
- **Assigned**
- **Suspended**
- **Working**
- **Disconnected**
- **Transitional**
- **Unknown**

NPA Overlay/Split

Consumption of NPA/NXXs has grown since the early 1990s, especially due to the rapid growth of cellular service. As a result, there is a constant need for new NXXs within an NPA area. This cannot be done since NXXs are 3 digit numbers and limited to the range 201-999. Instead, new NPAs are introduced into an NPA area. This is done via either an NPA Split or an NPA Overlay.

An NPA Split divides an NPA into two or more regions, one of which retains the existing NPA code and the other area(s) receiving a new code. This results in NXXs being moved from one NPA to another, forcing telephone customers to deal with having a new phone number.

An NPA Overlay assigns multiple codes to the same geographical area, eliminating the need for renumbering of existing services.

O

Old

The state of a **Record** that was previously in the **Active** or **Sending** state. A record is generally moved into the Old state because it was replaced by another **Active** or **Sending** record.

Open ROC Authorization Request

An Open ROC Authorization Request is one that has toll-free numbers which have not been processed; that is, numbers that have not been approved or denied.

Outgoing ROC Authorization Request

An Outgoing ROC Authorization Request is one sent by your Resp Org to the controlling Resp Org, asking that Resp Org to port a number to your Resp Org. An outgoing ROC authorization request may be modified in one of the following ways:

- remove one or more numbers from the request
- add additional documents to the request
- completely cancel the request

P

PAD

A PAD (Pointer Administrative Data) record is a Toll-Free Number record that contains a subset of **CAD** administrative data plus a **Pointer** to a **TAD** record.

See Also

- **CAD, TAD**

Related User Guide Sections

- **Record Management**
- **Search Local Records**

Pending

The state of a **Record** that has passed validation and is scheduled to go **Active** at some point in the future.

Pointer

A Pointer is a Toll-Free Number **PAD** record that references a **TAD** record (also known as an **SMS Template**) to specify how to route calls for this Toll-Free Number.

R

Record

A Record is the set of routing and administrative data associated with either a Toll-Free Number or an **SMS Template**.

A Toll-Free Number Record may be

- a **CAD** record, possibly with associated **LAD** and **CPR** data
- a **PAD** record with an associated **TAD** record.

An SMS Template Record is a **TAD** record.

Every Record has a specific **Effective Date/Time** that indicates when this Record will go **Active**.

See Also

- **Record Status**

Related User Guide Sections

- **Record Management**
- **SMS Template Management**
- **Search Local Records**

Record Status

Every Toll-Free Number and **SMS Template** has one or more **CAD** or **PAD** and **TAD** records. Each record has a Record Status that indicates the current state of the record. Possible Record Status values include:

- **Saved**
- **Pending**
- **Sending**
- **Active**
- **Old**
- **Invalid**
- **Disconnect**
- **Must Check**
- **Failed**
- **Hold**
- **Rejected**

All records have an associated date/time. For records stored at Somos, the minutes portion of this date/time must be on the quarter hour (:00, :15, :30, :45). Rejected records are only stored on 8MS and may have a time other than quarter hour. This time indicates when the record was sent to Somos.

Related User Guide Sections

- [Record Management](#)
- [Search Local Records](#)

Registry API

The Registry API is a programming [API](#) that interfaces with [SMS/800](#) for provisioning toll-free service. The Registry API is one of the APIs that 8MS uses to communicate with SMS/800.

Beginning with 8MS 17.1, 8MS is capable of using either the Registry API or the [MGI](#).

See Also

- [MGI](#)

Requesting Resp Org

In a [ROC](#) request, the Requesting [Resp Org](#) is seeking to gain control of a toll-free number. The Requesting Resp Org asks the [Controlling Resp Org](#) to perform a Change Resp Org, granting the Requesting Resp Org control of the number.

Rejected

An 8MS-only [Record](#) status indicating that a record was rejected by [SMS/800](#). All records have an associated date/time. For records stored at Somos, the minutes portion of this date/time must be on the quarter hour (:00, :15, :30, :45). Since Rejected records are only stored on 8MS, they may have a time other than quarter hour. This time indicates when the record was sent to Somos. All other records must have a time on the quarter hour.

See Also

- [Record Status](#)

Reserved

A Toll-Free Number state indicating the number is being held for future use for a [Resp Org](#).

Resp Org

A Resp Org (Responsible Organization) is an entity responsible for managing Toll-Free Numbers within a company. Each Resp Org is allowed to reserve, spare, give away or route Toll-Free Numbers.

ROC Authorization Request

A ROC (Resp Org Change) authorization request asks the [Controlling Resp Org](#) of a toll-free number to port that number to a [Requesting Resp Org](#), giving that requesting Resp Org control of that number. A single request may contain one or more toll-free numbers. Numbers do not need to be under the same controlling Resp Org. In the event that a ROC authorization request is sent to multiple controlling Resp Orgs, when a controlling Resp Org views the request, it may only see the numbers that are controlled by it.

See Also

- [LOA, ROC, ROC Management](#)

Related User Guide Sections

- [ROC Submit Request](#)

Response Frame

The Response Frame is the bottom portion of each user interface screen that sends a request to

SMS/800 or **Carrier Express**. Single Toll-Free Number request results are shown in the Response Frame; **Batch** results are shown in the **Activity Log**.

ROC

ROC is an acronym for Resp Org Change. The ROC service provides the ability to manage **ROC Authorization Requests**.

See Also

- **LOA, ROC Authorization Request, ROC Management**

ROC Management

ROC Management refers to the ability to modify a **ROC Authorization Request**. ROC authorization requests are split into two types: **Incoming** and **Outgoing**.

See Also

- **LOA, ROC, ROC Authorization Request**

Related User Guide Sections

- **ROC Management**

S

Saved

The state of a **Record** that is stored on SMS/800, but has not been completely validated. 8MS cannot retrieve Saved records because the **SMS/800's MGI** does not support it.

SCP

An SCP (Service Control Point) is a point on the telephony network (i.e., a computer) that tells the network what carrier is handling traffic for this Toll-Free Number. When a Toll-Free Number record is ready to activated it is loaded onto one or more SCPs through **SMS/800**.

Sending

The state of a **Record** that has been loaded on at least one **SCP** but has not been loaded on all SCPs.

Service Area

Service Area defines the region(s) from which a toll-free number will receive calls. A Service Area may be defined in terms of Network, State, LATA or Area Code.

Also known as an Area of Service or AOS.

See Also

- **CAD, TAD**

Related User Guide Sections

- **Service Area Field Definitions**
- **Record Management: SMS CAD, SMS Template Management**

Shortcuts

Shortcuts are hyperlinks within the 8MS user interface that allow you to execute a particular action found on another screen without having to go to the screen that contains that action. See the [Shortcuts](#) section of the user guide for details.

SMPP

SMPP, the Short Message Peer-to-Peer is a protocol used by the telecommunications industry for delivery of [SMS Messages](#).

SMS Message

SMS, an acronym for Short Message Service, is the term used for a text message which contains only text and no images or videos.

See Also

- [MMS Message](#)

SMS/800

SMS/800 is the system responsible for managing Toll-Free Numbers across the 8yy/Toll-Free industry. Its primary responsibility is to assign Toll-Free Numbers and route the numbers to one or more carriers. Each company that interacts with SMS/800 is given one or more [Resp Orgs](#). When a record is ready to be activated, SMS/800 loads the record onto one or more [SCPs](#).

SMS/800 can refer to either the legacy system or the new [TFNR](#) system.

SMS Template

An SMS Template is the routing data used by one or more Toll-Free Numbers.

Every [Working](#) Toll-Free Number has a set of routing data associated with the number. This set of data defines how calls are routed to a carrier for that number and what areas may dial the number. This routing data is typically bound to the specified number via the [CAD](#), [LAD](#) and [CPR](#).

As an alternative to binding the routing data to a number, an SMS Template (also known as a [TAD](#) record) may be defined which contains the routing data. When this is done, the SMS Template is pointed at by the number using a [Pointer](#) record (also known as a [PAD](#) record). Multiple numbers may point at a single SMS Template.

By allowing multiple numbers to reference one SMS Template, it is no longer necessary to update the routing data of each individual number when changing the routing. Instead, the single SMS Template is modified. Since all these number reference the SMS Template, the routing is automatically updated.

An SMS Template can be used as the [Source](#) or [Destination](#) of a [Copy Record](#) or other [Batch](#) operation.

Related User Guide Sections

- [Managing SMS Templates](#)
- [SMS Template Management](#)
- [Record Management](#)

Source

A Source is a Toll-Free Number **CAD** or **PAD** record, or an SMS Template **TAD** record used

- for populating a provisioning screen or
- as the set of data to be copied to a set of Toll-Free Numbers.

Spare

A Toll-Free Number state indicating the number is available for any **Resp Org** to reserve.

Suspended

A Toll-Free Number state indicating that the number was in the **Disconnected** state but now has a **Pending** record.

T

TAD

A TAD (Template Administrative Data) record is a Toll-Free Number record that contains routing and template administrative data. It is used in conjunction with a **PAD** record in place of a **CAD** record. See **SMS Template** for more details.

Related User Guide Sections

- **SMS Template Management**
- **Search Local Templates**

TFNR

TFNR (Toll-Free Number Registry) is the generic term used within 8MS to refer to the new SMS/800 TFN Registry. This system replaced the legacy SMS/800 system.

See Also

- **Registry API**
- **SMS/800**

Transitional

A Toll-Free Number state indicating that the number has reached its **End Intercept Date**.

U

Unavailable

A Toll-Free Number status indicating that the number should not be put into the spare pool.

Every **Resp Org** is assigned 2 test numbers from each of the active 8YY NPA's for testing purposes; these numbers are given an Unavailable status to prevent another Resp Org from reserving them in the event that the owning Resp Org accidentally spares them.

Unknown

An 8MS-only Toll-Free Number status indicating that a number is not on the 8MS platform.

This status is used when a user searches on the **Search Local Numbers** screen using a **Number List**. Any numbers shown in the results with a status of Unknown are not on the 8MS platform.

Unsolicited Messages

8MS communicates with **SMS/800** via messages sent over the **MGI**. Most messages sent from SMS/800 are in response to requests sent from 8MS. However, there is a set of messages that can be sent to 8MS without 8MS first sending a request to SMS/800. These messages are known as Unsolicited Messages.

Unsolicited Messages are designed to keep 8MS data in sync with SMS/800. If a user performs an action on another 8MS platform (i.e., another MGI client) or on the SMS/800 user interface, SMS/800 will notify 8MS that this action was taken.

The most important unsolicited messages sent from SMS/800 are notifications of number reservations, scheduling of **CAD**, **PAD** and **TAD** records and **Resp Org** changes. When 8MS receives an Unsolicited Message from SMS/800 regarding one of these items, 8MS will then send retrieve requests to SMS/800 asking for the new data. In this way, 8MS keeps it's data in sync with SMS/800.

8MS customers always have the option to turn off one or more Unsolicited Messages by submitting a request to 8MS. This is most often requested when an 8MS customer wants to avoid exceeding their number limits by disabling RespOrg changes and number reservations. This prevents 8MS from ever downloading numbers from SMS/800 without explicit user requests to do so.

User Interface Colors

Portions of the 8MS user interface are customizable. In terms of color, the background of screens may be set, as well as foreground and background colors for some data items. Generally speaking, *foreground color* refers to the color of the text being displayed while *background color* refers to the color of the box surrounding the text.

User Interface colors are defined in terms of Cascading Style Sheet (CSS) styles. Color values may be in one of the following formats:

- *keyword* - one of 17 recognized keywords based primarily on the original Windows VGA colors. This includes the values *aqua*, *black*, *blue*, *fuchsia*, *gray*, *green*, *lime*, *maroon*, *navy*, *olive*, *orange*, *purple*, *red*, *silver*, *teal*, *white*, and *yellow*.

Modern browsers may support additional keyword colors.

- **#RRGGBB** - a hex-pair notation of values representing the colors red, green and blue. Values are in hexadecimal notation in the range of 00-FF.
 - Pure red: **#FF0000**
 - Pure black: **#000000**
 - Pure white: **#FFFFFF**
- **#RGB** - a shorter form of the six-digit notation described above, with each letter representing the colors red, green and blue. The single color value is replicated to become

a six-digit value.

- Pure red: *#F00*
- Pure black: *#000*
- Pure white: *#FFF*
- *rgb(rrr.rr%,ggg.gg%,bbb.bb%)* - a percent notation representing the colors red, green and blue. Values are a percent in the range of 0-100.
 - Pure red: *rgb(100%,0%,0%)*
 - Pure black: *rgb(0%,0%,0%)*
 - Pure white: *rgb(100%,100%,100%)*
- *rgb(rrr,ggg,bbb)* - a decimal integer notation representing the colors red, green and blue. Values are in the range of 0-255. *rgb(255,0,0)*
 - Pure red: *rgb(255,0,0)*
 - Pure black: *rgb(0,0,0)*
 - Pure white: *rgb(255,255,255)*

Related User Guide Sections

- [Customizing 8MS](#)

UTC

UTC stands for Coordinated Universal Time and is the basis for civil time today. It is not a time zone but rather is the universal time based on International Atomic Time and the Earth's rotation. UTC is roughly equivalent to what was known as Greenwich Mean Time, the current time at the Prime Meridian located at 0 degrees longitude.

W

Working

A Toll-Free Number state indicating that the number has an **Active Record** at one or more **SCPs** (i.e., the number is actively processing calls).

This section of the user guide lists all third party software distributed with the 8MS application.

Geometry/Positioning Javascript Code

Javascript code for calculating geometry and positioning of html objects is taken from the book JavaScript: The Definitive Guide, 5th Edition, by David Flanagan. Copyright 2006 O'Reilly Media, Inc. (ISBN: 0596101996)

MultipartRequest Java Code

Java code for processing multipart requests, used for uploading files to the 8MS server, is accomplished using the *MultipartRequest v 1.17*, which is used and is licensed under the GNU Lesser General Public License v2.1 (the LGPLv2.1).

© MultipartRequest servlet library

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A copy of the Lesser General Public License (lesser.txt) is included in this archive or goto the GNU website <http://www.gnu.org/copyleft/lesser.html>.

The source code is available at <https://github.com/pellcorp/multipartrequest>.