Set up a Customer Site

Request Access to the Cisco Business Edition 4000 Management Portal

Before you begin

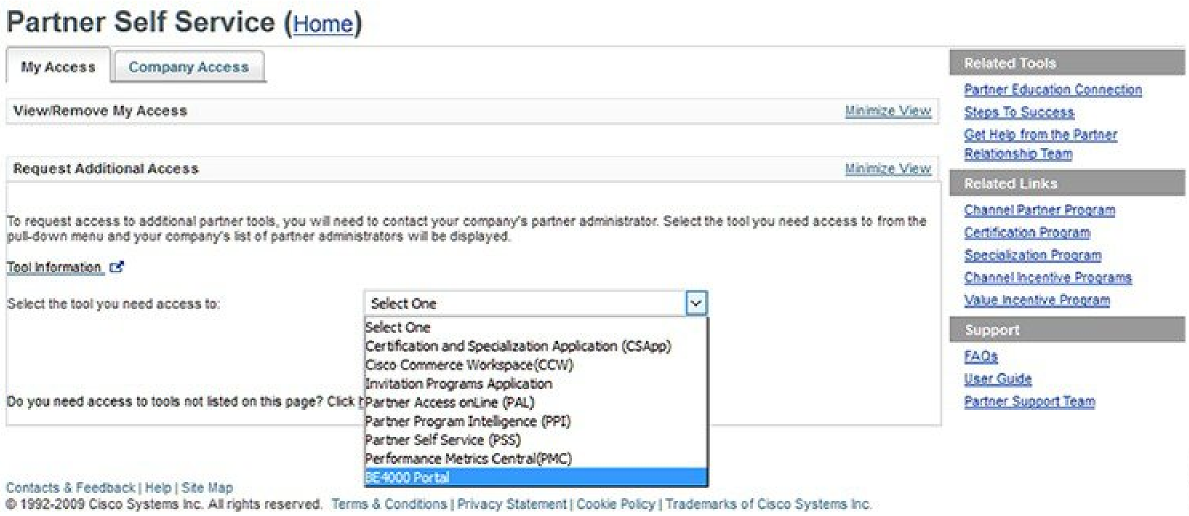
- You must have Cisco ID. If you do not have a Cisco ID, Register Now.
- You must be associated with a Cisco Partner. If your company is new to Cisco, complete Partner Registration.

Procedure

Step 1 Log in to the Partner Self Service (PSS) portal—http://www.cisco.com/go/pss with your Cisco ID.

Step 2 Select **Manage My Access**.

Step 3 Click **Request Additional Access**.



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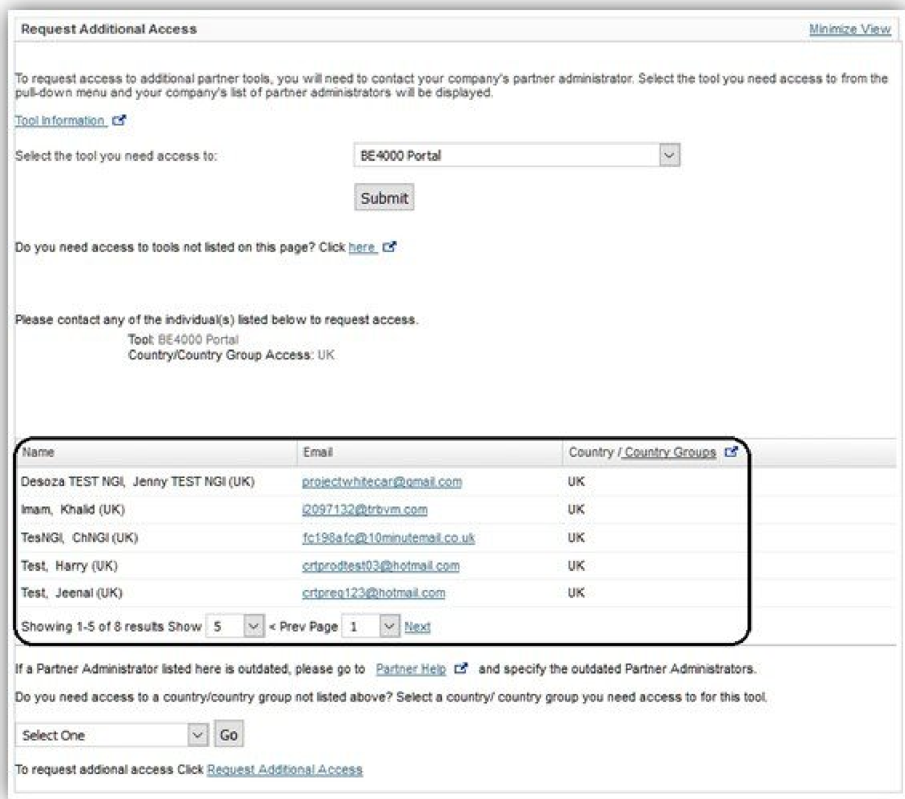
Step 4 Select **BE4000 Portal** from the drop-down list.



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Step 5 Click **Submit**.

Step 6 Contact one of the Partner Administrators from the list for the Cisco Business Edition 4000 Management Portal access.

What to do next

A Partner Administrator adds you as a user and grants access to the Cisco Business Edition 4000 Management Portal. For details on how a Partner Administrator can grant access, see Add Partner Users for Accessing the Cisco Business Edition 4000 Management Portal, on page 3.

Add Partner Users for Accessing the Cisco Business Edition 4000 Management Portal

Note Only a Partner Administrator can perform the following steps and grant access to the Cisco Business Edition 4000 Management Portal.

Procedure

Step 1 Log in to Partner Self Service (PSS) portal—www.cisco.com go pss with your Cisco ID.

Step 2 Select **Manage My Access** from the drop-down list.

Step 3 Select **Company Access** tab.

Step 4 Search and add the user.

Step 5 Click **Edit**, select BE4000 "User" from the list of services, and click **Next**.

Step 6 Enter description in the comments field, and click **Submit**.

Access Cisco Business Edition 4000 Management Portal

Before you begin

To access the Cisco Business Edition 4000 Management Portal, Cisco partners are required to use two factor authentication using a standards-based one time password (OTP) generator together with their Cisco.com user account. Varieties of standards-based OTP applications are available (some of them are listed here), free of charge, for most makes of smart phone.

- For iPhone phones: OTP Auth or Google Authenticator.
- For Android phones: Google Authenticator or FreeOTP Authenticator.

Note The PingID authentication application is not currently supported.

Procedure

Step 1 Go to the URL:https://be4000.cisco.com.

Step 2 Sign in using your Cisco.com credentials.

Step 3 Accept the Terms of Service.

Step 4 Click **Continue**.

Step 5 Enter the device name. The name entered here is displayed on the OTP application that is configured on your smart phone. Click **Continue**.

Step 6 Use the OTP application to scan the QR code. Click **Continue**.

Step 7 Enter the security code that is generated by your OTP application. Click **Continue**.

Step 8 Save the recovery code. Click **Continue**.

Note If you lose your smart phone, you can sign in using the recovery code.

When you log in to the Cisco Business Edition 4000 Management Portal for the first time, a video containing the information about how to configure, deploy, and manage a BE4000 site is displayed. You must watch this video completely to proceed further and view the Cisco Business Edition 4000 Management Portal dashboard.

Cisco Business Edition 4000 Management Portal Dashboard

The Cisco Business Edition 4000 Management Portal uses a three-section layout which consists of the following:

- Top-level section with notifications and high-level user details.
- Feature menu section that helps to manage BE4000 sites and edit the column display.
- Content section that displays only after a BE4000 is added to the page.

Once the customer is added on the page, you can view customers and add, update, or delete their configuration details.

The features of the dashboard are explained as follows:

Feature	Description
	Your BE4000 Partner users and list.
? Help	Information on how to get started and the documentation available.
Customer Search	You can search for your customers and find key information about each site, users, or groups anytime.
	Refreshes all customer data on this page.

Feature	Description
Edit Columns	View more details of the site and appliance. For example, IP address, last call, version, the last change made, created by, and so on. By default, you see details of the following columns: • Customer Name • Location • Status • License • Serial Number • Phones • Phones • Last Change • Actions
Add Customer	Add a new customer. See Add a BE4000 Customer Site in Cisco Business Edition 4000 Management Portal, on page 7.

The **License** column of Cisco Business Edition 4000 Management Portal dashboard displays the Cisco Smart License status of your BE4000 site. For more information on Licensing, see Smart License.

Collect BE4000 Customer Network Requirements

The following information is mandatory to create and configure a customer site. Contact your customer and collect the details.

Customer Contact Details

- Customer Name
- Location where the BE4000 appliance is placed
- Customer administrator’s email address
- Customer administrator’s contact name

LAN Network Details

- BE4000 IP Address
- Voicemail IP address and subnet mask
- Gateway address
- Internet Service Provider Name
- SMTP Service details (Required to enable voicemail to email functionality)

Direct Dial Numbers

Direct Dial Numbers are customer's numbers for SIP, BRI, and PRI connections. Collect the numbers and the service name for each number.

SIP Trunks

Customer preference for SIP trunk connectivity:

1. Use the main interface (GE 0/0/0) of the BE4000 for the SIP trunk and internet connectivity
2. Use the BE4000 secondary interface (GE 0/0/1) connected to a dedicated internet connection for SIP trunk and use the main interface (GE 0/0/0) of the BE4000 only for internet connectivity

If customer chose option 2, check which one of the following they are using for the SIP trunk:

- Static address
- Dynamic address

If they are using static address, collect IP address, subnet mask, default gateway, service name, and proxy server and port details, and trusted IP addresses.

If they are using dynamic address, collect the interface type they are using, service name, and proxy server and port details, and trusted IP addresses.

Line Cards

Check if your customer wants to connect to traditional telephone services and devices. If yes, ensure that the customer orders the NIM card based on the required services. Refer to **Cisco Business Edition 4000 Release Notes** for the list of supported NIM cards.

Collect the information on the type of NIM card its associated details from your customer.

- For FXS Cards, collect Extension name, extension number, class of restriction (COR), u-law/a-law
- For FXO Cards, collect Line name, line number, Inbound only/In and Out, u-law/a-law
- For BRI Cards, collect Service name and Overlap receiving (enabled or disable)
- For PRI Cards, collect Service name, T1/E1, ISDN Switch type

Dial Plan

- Country
- Local Dialing Options
- Telephony port tone
- Time zone
- Language preference
- Number of digits in an extension
- Digits to dial
  - An outside line
  - An intercom extension

- To send voicemail automatically

End User Details

- For user-specific phones—First name, last name, display name, extension number, phone mode, COR, email address if user requires voicemail functionality
- For public phones (used for common services such as a conference room)—Display name, extension, and phone type

Business Hours

Customer's working days and hours.

Maintenance Schedule

A 2-hour block of time each day when it is safe for the system to install the software updates. The system may be offline and unable to make or receive phone calls during the maintenance schedule.

Add a BE4000 Customer Site in Cisco Business Edition 4000 Management Portal

Use the Setup Assistant wizard in the Cisco Business Edition 4000 Management Portal to create your new customer site. You can view and manage multiple customers. Here, each customer is equivalent to a single BE4000 appliance. Each site has a BE4000 that is configured with features for users connecting through that site.

Before you begin

You must have your customer network information ready before you create a site. See Collect BE4000 Customer Network Requirements, on page 5.

Procedure

Step 1 Click **Add Customer** on the upper right corner of the dashboard.

Step 2 Click **Get Started** to start creating a customer site.

Step 3 Enter the customer and location details on the **Add Customer** page. See Add Customer Field Descriptions.
You can manually enter the customer details to create a site or select a template. Selecting the template auto populates the network information and other site details based on the template.

Step 4 Enter the **LAN Network Connection**, **Direct Dial Numbers**, **SIP Trunks**, and **Line Card** information collected from the customer on the Connectivity page. See Connectivity Field Descriptions.

Step 5 Enter the **Region Settings**, **System Settings**, and **Dial Plans** information collected from the customer on the Dial Plan page. See Dial Plan Field Descriptions.

Step 6 Enter the details of the users, extensions, and other calling features on the Stations page. See Stations Field Descriptions.
You can manually enter the details by adding rows or upload your spreadsheet (based on the template) containing the user details.

Step 7 Create Hunt Groups, Auto Attendant, and so on, based on customer requirements on the Call Routing page. See Call Routing Field Descriptions.

Step 8 Upload an audio file for Music On Hold, create paging groups, and so on, based on the customer requirements on the Features page. See Features Field Descriptions.

Step 9 Click **Yes** if you want to apply the entered BE4000 configuration changes for your site. Else, click **No** to continue with editing the setup assistant configurations.

Once you are done with the setup assistant, you are ready to deploy the site you created.

Note If you terminate the Setup Assistant wizard after adding customer details before completing the configurations, the customer site is created and listed in the dashboard. You can edit the configurations later.

Redeploy the BE4000 Site

Procedure

Step 1 Log in to be4000.cisco.com.

Step 2 Click **Replace/Reset** corresponding to the desired site from the Actions menu.

Step 3 Click **Factory Reset**.

Step 4 Click **Reset** in the pop-up window that appears.

Factory reset is performed on the existing hardware to reset the system configuration to the pre-deployed state. All configuration changes made after the initial setup is deleted, including audio files and system backups. All the phones connected to the BE4000 appliance are disconnected.

Replace a Faulty BE4000 Appliance

BE4000 supports Return Material Authorization (RMA), wherein you can replace a faulty BE4000 appliance with a new one. The configurations of the faulty appliance can be restored onto the new one.

If the faulty appliance is online, you can take the backup of the configurations before flagging the appliance for RMA. If the faulty appliance is offline, you cannot take the backup of before flagging for RMA. However, if the appliance had any existing backups, you can select it while deploying the replacement appliance.

Table 1: RMA Task Flow

Step	Task	Purpose	Prerequisite	References
Step 1	Flag the faulty appliance for RMA	Flag the customer site for RMA so that the faulty appliance can be replaced with the new appliance.	—	Flag the Faulty BE4000 Appliance for RMA, on page 9
Step 2	Deploy the RMA Replacement Appliance	Deploy the new appliance that is received for RMA with the same site configurations as it was on the faulty appliance.	• Have the serial number of the new appliance • If you had line cards on faulty appliance, ensure that the same (or same type) line cards are inserted.	Deploy the RMA Replacement BE4000 Appliance, on page 9

Flag the Faulty BE4000 Appliance for RMA

Procedure

Step 1 Log in to be4000.cisco.com.

Step 2 Click **Replace/Reset** corresponding to the desired site from the Actions menu.

Step 3 Click **Replace Hardware** to migrate the existing configuration to new hardware.

Step 4 Click **Save** in the RMA Device pop-up window.

If you close the **RMA Device** pop-up window after the **Backup in Progress** displays, the system backup will continue uninterrupted. A new system backup can be triggered only once the current backup is complete.

Once the initially triggered system back up is complete and if you had closed the **RMA Device** pop-up window, a toaster message is displayed at the bottom right corner of the BE4000 site. The message displays the system backup status as **Backup Complete** or **Backup Failed**.

Deploy the RMA Replacement BE4000 Appliance

Before you begin

- Have the serial number of the RMA replacement appliance.
- Power off the faulty BE4000 appliance and remove all cable connections. Ensure that you remember all cable connections as the same needs to be replicated on the RMA replacement BE4000.

- If you had line cards on faulty appliance, ensure that the same (or same type) line cards are inserted.

Procedure

Step 1 Power on the RMA replacement BE4000 appliance and connect the required cables.

Step 2 Set up the IP address, subnet mask, and default gateway using the Local Administration screens. For information on accessing local administration screens, see Local Administration.

Step 3 Log in to be4000.cisco.com/deploy or use a QR scanner application on your smart phone to scan the QR code on the underside of the product.

Step 4 Enter the serial number of the new appliance, if prompted.

Step 5 Select the customer and site from the **Customer** and **Site** drop-down lists.

Step 6 Select the backup from the **Restore from backup** drop-down list.

Step 7 Verify Network Interface Module (NIM) cards (if necessary) are inserted in appropriate slots, cables are connected and BE4000 is powered ON.

Step 8 Click **Deploy Configuration**.

- You can reenter the serial number if there is a deployment failure due to an incorrect serial number. The failed site is listed along with the other sites in the **Ready to Deploy** state. Enter the correct serial number and select the failed site to continue the deployment process.