Line Number (10-digit Direct Inward Dial number): _____ – _____ – _____

New User's Name _____

Administrator Portal: portal.popp.com/bg
First-time login – go to portal.popp.com, click the "Reset Password" link and follow the instructions sent via e-mail to set your password.

See the Administrator Portal - Reset or Rename User training video found on popp.com/support for a step-by-step demonstration of how to complete the steps below

Introduction:

When an employee leaves the company and you want to reassign their line to a new user, you can choose to either reset the line or rename the line:

Reset - permanently delete all of the previous settings including:
- Saved voicemail greetings and messages
- Voicemail delivery settings
- Contacts
- Any phone button configurations specific to the user

Once the line is reset, you will need to update settings including the name, Administrator setting, internal caller ID name, account e-mail address, voicemail settings, auto attendant options, call routing, and monitored extension phone buttons. The new user will need to set a new password and record a new voicemail greeting.

Rename - update the name <u>without</u> permanently deleting:
- Saved voicemail greetings and messages
- Voicemail delivery settings
- Contacts
- Any phone button configurations specific to the user

Once the line has been renamed, review and update settings including the name, Administrator setting, internal caller ID name, account e-mail address, voicemail settings, auto attendant options, call routing, and monitored extension phone buttons. The new user will need to set a new password and record a new voicemail greeting.

Checklist:

☐ **Decide if you want to Reset or Rename the line**

☐ **Login to the Administrator Portal at portal.popp.com/bg**

☐ **Step 1 – Reset or Rename User**
To Rename: Go to All Lines > Edit personal details > Name
-or-
To Reset: Go to All Lines > Reset Line

☐ **Step 2 – Update Administrator Setting**
All Lines > Edit personal details > Admin

☐ **Step 3 – Update Internal Caller ID Name**
All Lines > View individual settings > Call Settings > Caller ID Name

☐ **Step 4 – Configure Account E-mail Address for Password Reset**
All Lines > View individual settings > View Account Settings > Configure Account E-mail

☐ **Step 5 – Update Voicemail Message Settings and Notifications**
1. Message Settings: All Lines > View individual settings > Message Settings > General
2. Notifications: All Lines > View individual settings > Notifications

☐ **Step 6 – Update Automated Attendant Options**
Go to Attendants > click on Easy/Premium Auto Attendant > Open Attendant Settings > Easy/Premium Attendant Menu

☐ **Step 7 – Update Call Routing**
1. Hunt Groups: Go to Hunt Groups > click on hunt group > Hunt Group Members tab
2. Main Number Call Routing: Go to Users > click on main number > Go to Call Manager > Rules tab > Sets of Rules

☐ **Step 8 – Update Monitored Extensions on Phone Profiles**
Go to Phones > manage your phone profiles > Edit > Programmable Keys – Line > expand each key

☐ **Step 9 – New User Resets Password and Sets up Voicemail**
Instruct the new user to reset their password and set up their voicemail as follows:
1. Reset Password:
Instruct user to go to portal.popp.com > Reset Password
2. Set up Voicemail:
If line was *Reset*:
Instruct user to press voicemail (envelope) button on phone or dial *15 and follow prompts to set up their voicemail greeting, name, and PIN.

If line was *Renamed*:
Note: You must reset the voicemail PIN before the user can set up their voicemail. Go to All Lines > View individual settings > View Account Settings > Change Voicemail PIN.
Once the voicemail PIN has been reset, provide the user with their 10-digit phone number, new voicemail PIN, and a link to the Voicemail User Guide (found on popp.com/support). Instruct the user to follow the instructions to change the voicemail greeting, change the name, and change the voicemail PIN.

For Additional Training and Support
- Visit www.popp.com or call POPP Communications at 763-797-7900