CommPortal: End User Guide

In depth guide for the CommPortal for End Users.

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Welcome to the CommPortal!

This guide describes the features of the web management tool, CommPortal.

The guide will help you get up and running with your new service as soon as possible. It tells you how to use the portal and the more commonly used features.

CommPortal provides a web interface to your phone settings and allows you to:

- view recent calls
- view and listen to your voicemails
- set up your contacts
- change your phone's and phone system's settings

If after referring to this guide you're still having problems with your Pod phone system then please contact your administrator.

Introducing CommPortal

CommPortal provides a web interface to your phone settings.

Accessing

To access CommPortal point a browser at https://commportal.connectbetter.net

CommPortal is supported on Windows Vista and later, using the following browser versions:

- Internet Explorer 11
- Edge
- Firefox
- Google Chrome

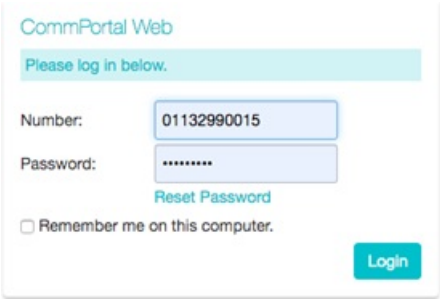
JavaScript must be enabled on your browser.

CommPortal is also supported on Mac OS X10.8 and later on Safari version 5 or later and Google Chrome (Mac OS X only).

Logging in

The following shows a sample CommPortal login page.

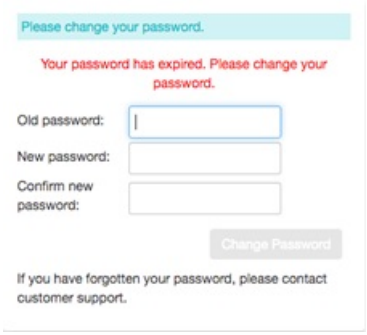
CommPortal login page



To log into CommPortal enter your phone number followed by your password, and click on Login.

- If this is the first time you have attempted to log in, you will asked to reset your password.

CommPortal change password



- You will be asked for a security email address. This is required in order to keep you informed of password changes and to send forgotten password links

If you are using a public computer, do not tick the *Remember me on this computer* checkbox and always make sure you explicitly log out of CommPortal when you have finished to protect your account from being accessed by other users.

Changing Your Password

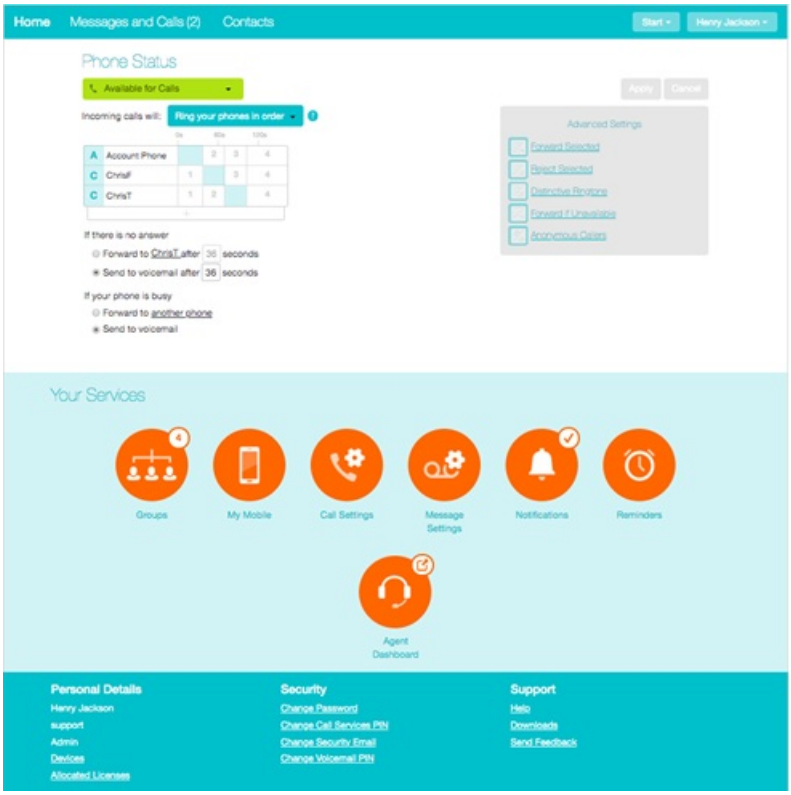
There are two ways to change your password:

- Use the **Reset password** link on the login page. This option is particularly useful if you have forgotten your current password.
- Use the **Change Password** link in the bottom panel of the CommPortal Home page. You must know your current password as you will need to enter this before you can set a new password.

Using CommPortal

Once you have logged in, you will see the CommPortal Home page.

CommPortal Home page



Along the top of the window are a series of links which you can select to take you to the different pages within CommPortal.

- **Home**. This is the home page you see when you first log into CommPortal. This becomes a Back button on other screens so that you can easily find your way back to the Home page.
- **Messages & Calls**. This shows you all of your voice, fax and video messages, and the calls you've made, answered or missed.
- **Contacts**. You can add and view all of your contacts and their phone numbers in this tab.
- **MakeCall/Start Meeting**
  - **Make Call** This launches a Dialer so that you can make calls directly from CommPortal.
  - **Start Meeting** This opens up the Meeting application so that you create Meetings and/or manage Webinars.
- Your name, with a drop-down where you can log out of CommPortal. You should log out of your account when you have finished to avoid the risk of someone else accessing it. This is particularly important if you are viewing CommPortal on a shared computer.
  - If you have any other lines associated with your CommPortal account, this drop-down will also include a links to the UIs for those lines.

The main panel shows your Phone Status.

- If you have a Call Manager service, you can use this panel to configure the incoming call and call forwarding services on your phone line, like Call Forwarding and Selective Call Rejection.

The **Your Services** panel provides links to screens where you can configure the various CommPortal services that you have. For example:

- **Reminders**. This page allows you to set up reminder calls.
- **Groups**. Here you can view any groups your line belongs to, such as hunt groups. You can also login and logout

of groups here.
- **Call Settings and Messaging Settings**. Here you can configure how calls and messages are handled.

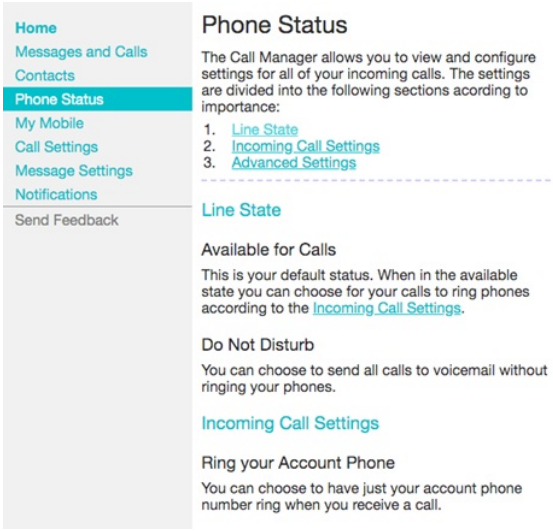
The bottom panel gives you access to numerous other options, such as changing your password and PINs, configuring the keys on your desk phone, downloading CommPortal apps, accessing Help pages, and sending feedback to report problems with the interface to your service provider.

Using the functions in each of these pages is described in more detail in the rest of this document.

Getting Help

If you need some assistance with using CommPortal, you can click on the**Help** link at the foot of the page.

You will then see another browser window with help for the page you are currently using:

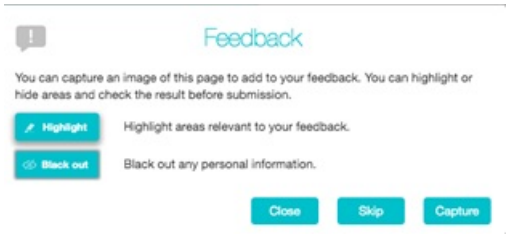


Sending Feedback

If you want to send feedback to your service provider, for example to report a bug or suggest an enhancement, click on the **Send Feedback**

You will then see a pop-up.

CommPortal Send Feedback



- If you want to include a screenshot of the CommPortal interface:
  - Highlight particular areas of the screen by selecting**Highlight**, positioning the cross-hatch and then dragging – the area that will be included in the screenshot will be highlighted.
  - Use the **Black out** option to disguise any personal information
  - Click **Capture**.
- If you do not want to include a screenshot, click**Skip**.
- This launches a second screen, with the screenshot on the right (if you have taken one) and a box where you can add a description of the problem you have encountered or enhancement you would like to see.

Send Feedback second pop-up



- Finally, click the Submit link to send your feedback.

Logging out

If you don't use CommPortal for 30 minutes you will be automatically logged out. However, if you wish to manually log out, for example because you've been accessing CommPortal using a shared computer, you can do this by clicking the drop-down arrow alongside your name at the top of the screen, and then selecting **Logout**.

Messages & Calls

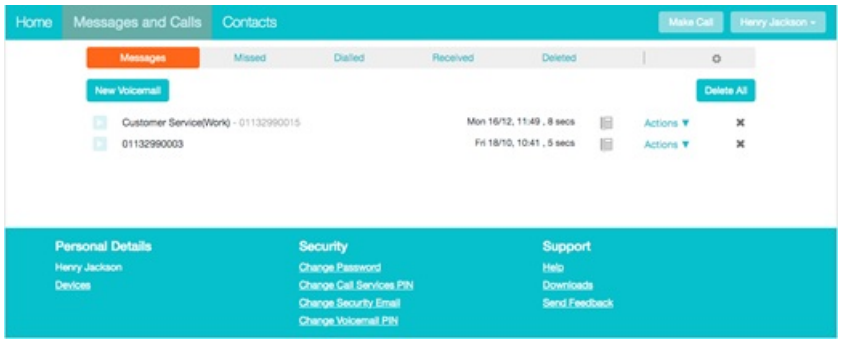
You can access the Messages & Calls page from the top section of the Home page. The Messages & Calls page has a number of sections which you can select by clicking on the relevant tab.

Messages

Messages

This shows you all stored voice messages, both those you have listened to and those you haven't. Unheard messages are shown in bold:

Messages & Calls – Messages tab



Listen to a Message

To listen to a message click on the play icon to the left of the message:

This will pop up a Voicemail player which loads and plays the message.

Voicemail Player



With this player you can:

- See when the message was received and how long it is.
- Pause, rewind and fast forward the message.
- Mute the player or change the volume.
- Delete the message, or Save it to disk.
- Close the player.
- If you are able to use video messaging, you will see the video content of your messages in the large window.
- If you have the Speech to Text service, you will see a transcript of the message.

Deleting a Message

To delete a voice message, click on the Delete icon to the right of the message.

- The message will be moved to the Deleted tab.

Marking a Message as Heard

Listening to a voice message will mark it as heard. If you want to mark a message as heard without listening to it, follow these steps:

- Click on the Actions icon to the tight of the message and select **Mark as heard** from the dropdown

Message options drop down menu



Marking a Message as New

To mark a message as new, follow these steps:

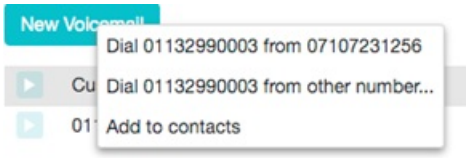
1. Click on the Action icon to the right of the message, as shown above
2. Select **Mark as new** from the dropdown.

Call Back

To call back a caller who left you a voice message, follow these steps:

1. Click on the number or name of the caller.
2. Select the required *Dial* section

Call back message sender



Add Caller to Contacts

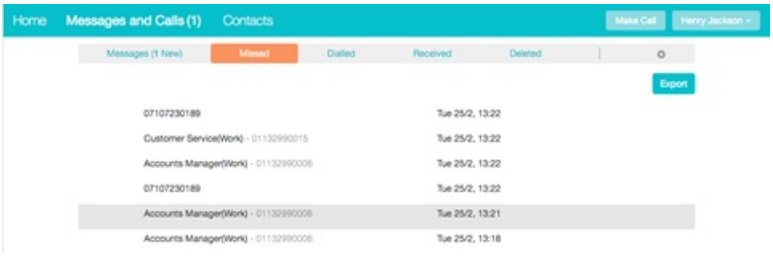
To add the number of someone who left you a voicemail to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will take you to the Contacts page. Enter the details for your new contact and click on Save. See Contacts section for more information on using the Contacts page.

Missed

The Missed section shows you the recent calls that you have received but did not answer:

Messages & Calls – Missed tab



If a caller is in your Contacts list then their name will be shown instead of their number, and an icon indicating which of that Contact's numbers they used to call you.

If you have a Call Manager service, Show Rule takes you to the Home page where you can view your Call Manager configuration.

Add Caller to Contacts

To add the number of someone who called you to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the Add to contacts

This will now take you to the Contacts page. Enter the details for your new contact and click on Save. See Contacts section for more information on this

Dialled

This page shows you all of the recent calls you have made, including those which you made using Click To Dial

Add Dialled Number to Contacts

To add the number of someone you called to you to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the Add to contacts
3. This will now take you to the Contacts page. Enter the details for your new contact and click on Save. See Contacts section for more information on using the Contacts page.

Received

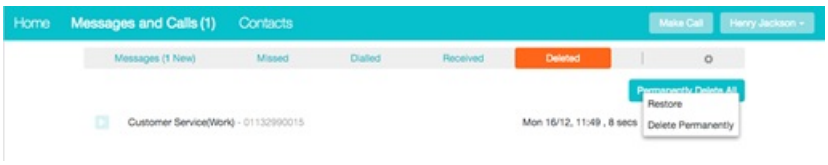
Add Number to Contacts

To add the number of someone who called you to your to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* section
3. This will now take you to the Contacts page. Enter the details for your new contact and click on Save. See Contacts section for more information on using the Contacts page.

Deleted

This page shows you all the messages that you have deleted from the other tabs on the *Messages & Calls* pages.



Listen to Deleted Messages

To listen to messages on this tab:

1. Click the play icon to the left of the message
2. Use the Voicemail Player described in *Listen to a Message* section.
3. Click the **Restore** button on the Voicemail player if you want to return this message to the *Messages* tab.

Restoring Deleted Messages

To restore messages:

1. Click on the Actions icon to the right of the message.
2. Select **Restore**.
3. The message will now appear on either the Messages

Permanently Delete Messages

You should regularly delete unwanted messages from this tab to avoid your mailbox reaching its quota and making it impossible for you to receive new messages.

To delete a single item:

1. Click on the Actions icon to the right of the message.
2. Select **Delete Permanently**.

To delete all the messages on this tab:

1. Click the **Permanently Delete All** button at the top right of the page.

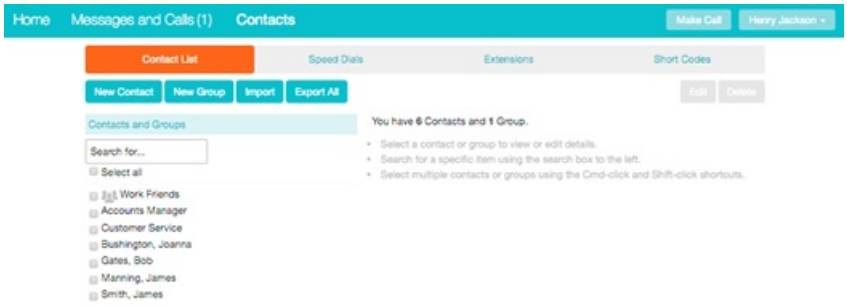
Contacts

The Contacts page, accessed from the top banner of the Home page, consists of a number of different sections, which you can select by clicking on the tabs.

Contact List

The Contact List shows you all of your contacts:

Contacts – Contact List tab



Searching

To search, enter the letters you want to search for in the text box. CommPortal will narrow down the contacts displayed as you type, and the text that matches your search will be highlighted.

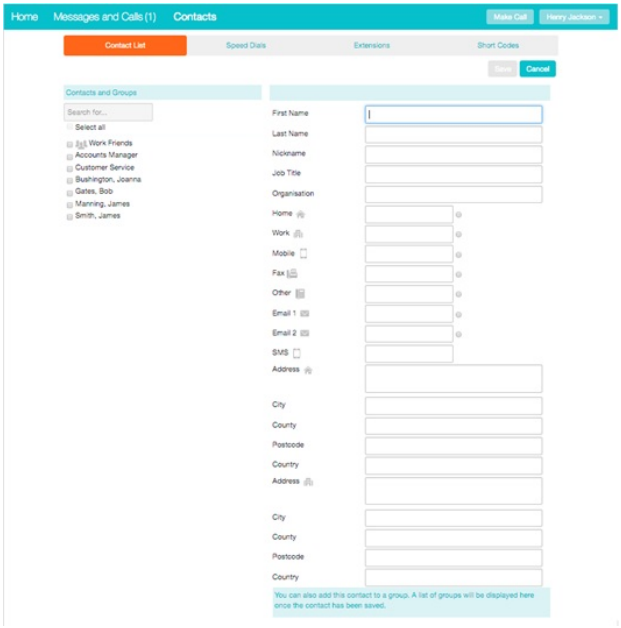
To cancel the search and view all of your contacts, delete the search text you entered.

Add New Contact

To add a new contact, follow these steps:

- Click on *New Contact* at the top of the screen.

CommPortal new contact page



- Enter the details for your new contact in the text boxes provided.
- Enter any phone numbers for your contact in the text boxes provided. You can select the radio button to the right of a number to indicate that it is the preferred number for this contact.
- Enter any addresses for your contact in the text boxes provided.
- Click Save.

Your new contact will now have been added.

Editing a Contact

To edit a contact, follow these steps:

1. Select the contact you wish to edit from the list on the left hand side of the screen.
2. Click **Edit**.
3. Modify or add any details.
4. Click **Save**.

Deleting a Contact

To delete a contact, follow these steps:

1. Select the contact you wish to delete from the list on the left hand side of the screen.
2. Click **Delete**.

Calling a Contact

To call a contact using Click To Dial, follow these steps:

1. Click on the number of the contact you wish to call.
2. Select the appropriate Dial

Calling a contact from the Contact List



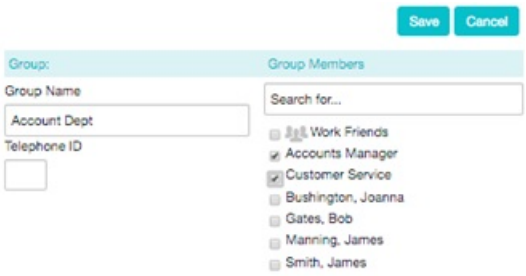
Groups

You can manage your contacts by assigning them to groups. For example you might have a group for "Work" contacts and another group for "Personal" contacts. Groups are distinguished by an icon and will appear at the top of your list of contacts.

To add a new group, follow these steps:

- Click on **New Group**

Adding a new group – entering details



- Enter a name for the group in the *Group Name*
- Enter an ID for the group in the *Telephone ID*
- Select any contacts you want to be in the group from the list on the right hand side by ticking the checkbox alongside a contact.
- Click on Save

The new group will now appear in the Contacts and Groups section.

By selecting a group you can search within it for the group members, by using the Search for box on the right hand side of CommPortal.

To edit a group, follow these steps:

1. Select the group by ticking the checkbox alongside it on the left hand side.
2. Click on **Edit**.
3. Change the group settings, or members.
4. Click on **Save**.

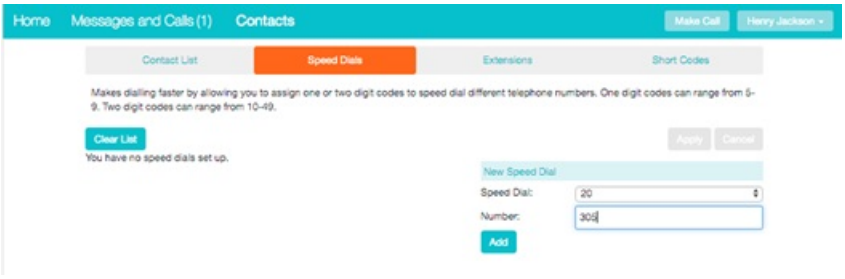
To delete a group, follow these steps:

1. Select the group by ticking the checkbox alongside it on the left hand side.
2. Click on **Delete**.

Speed Dials

The Speed Dials section allows you to configure numeric speed dials:

Contacts – Speed Dials tab



You use these speed dials by dialing ** then the one or two digit speed dial number from your phone. They are different from speed dials which are assigned to particular keys on your phone.

Adding a Speed Dial

To add a speed dial, follow these steps:

1. Select the number for the speed dial (5 – 49) you'd like to set up from the Speed Dial drop down list.
2. Enter the number this speed dial should call, as you would dial it. For example, if you dial 9 before a number, enter 9 and the number here.
3. Click on **Add**.
4. Repeat steps 1-3 for any other speed dials you want to set up.
5. Click on **Apply** to save your changes.

Deleting a Speed Dial

To delete a speed dial, follow these steps:

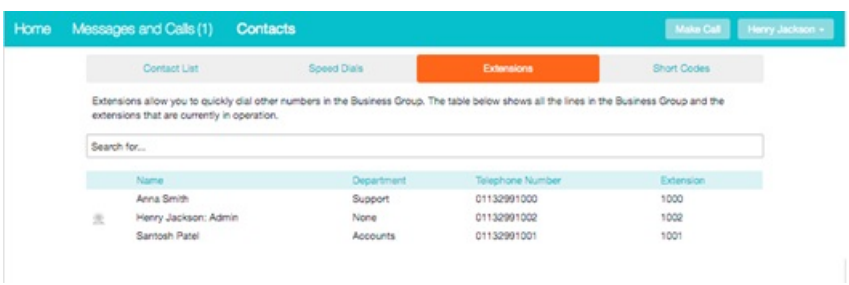
1. Click on the Trash icon to the right of the speed dial.
2. Click on **Apply**.

Alternatively to delete all of your speed dials, follow these steps:

1. Click on ClearList.
2. Click on **Apply**.

Extensions

The Extensions section lists of all the extensions in your business:

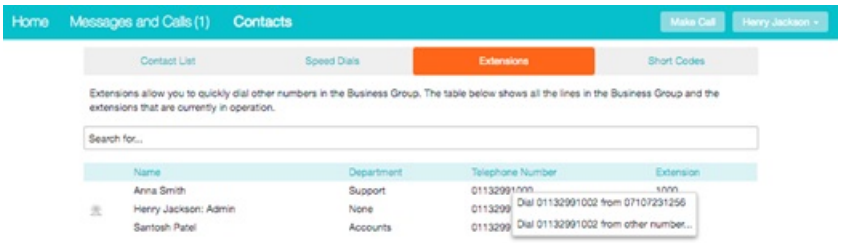


To use **Click To Dial** to call any of these extensions, follow these steps:

1. Click on the number of the extension you wish to call.

2. Select the **Dial**

Using Click To Dial from the Extensions tab



Your administrator sets up these extensions.

Short Codes

The Short Codes section shows you all of the speed dials set up for all the phones in your business:

Short Codes tab



You can dial these short codes from any phone in the business to reach the destination. Your administrator sets up these short codes. Short codes may also include a name to help you identify them. These names will appear in your SIP phone’s address book alongside your Business Group contacts and in your CommPortal contacts. The name will also be used in Calling Name delivery if you have that configured and the short code corresponds to a full national or international number.

Business Call Manager (BCM)

Business Call Manager (BCM) enables you to configure and manage your incoming and call forwarding services on a single screen.

Setting Your Availability

You can use the drop-down at the top left of the screen to set your status to either *Available for Calls* or *Do Not Disturb*.

Configuring availability

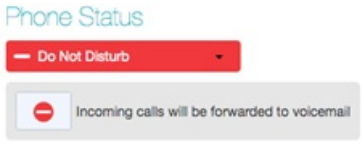


Use your mouse to select your status.

If you select *Do Not Disturb*:

- the lozenge turns red
- your incoming calls will usually be diverted to voicemail.
- if you have also turned on Busy Call Forwarding, you will see a warning icon – when you click on this, you will see a pop-up explaining that calls will be forwarded to the Busy Call Forwarding number. You can click a link to deactivate this service if you want calls to either be rejected or, if you have a voicemail service, sent to voicemail.

Do Not Disturb



Incoming Call Settings

In the central panel, you can configure your Incoming Call Settings.

You have a number of options on the Incoming Call Settings panel. You can configure

- how your phones will ring when you receive a call
- how the call should be handled
  - if you do not answer after a specified time
  - if your line is busy.

Once you have made all your changes, you must click **Apply** to save them.

Configuring how your phone(s) will ring

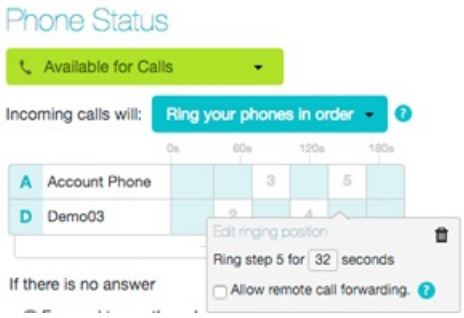
Use the drop-down alongside *Incoming calls will:* to select one of the options.

If you select *Ring your Account Phone*, you will see a box with your account phone number in it. When you receive a call, this is the phone that will ring.

If you select *Ring your phones in order,* you will then be able to configure the order in which your different phones will ring.

In the following example, your account phone would ring first, then your mobile phone and the temporary number, and finally both the account and mobile phones would ring together.

Configuring ringing order

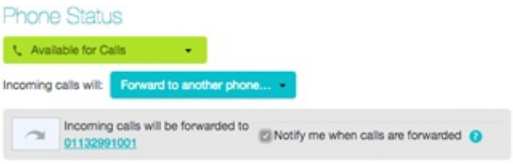


- You can optionally add more phones by clicking the empty panel and either selecting a phone number from a list of saved numbers, or manually entering a phone number. A new row will then be added.
- You can configure up to 6 ringing steps for each of your phones.
- You can change the length of ring for a step.
  - Hover over the timing column or over the marker along the top of the table.
  - Click and hold the handle that appears and drag left to right to change the length of ring.
  - The number indicator on the handle will indicate the current value.
- You can delete a phone from the table by hovering over the name/number field and clicking on the small cross that appears on the right of the name/number.
- When configuring these settings, you will see helpful pop-ups explaining the basics of what can be configured.

If you select *Ring your phones together*, all your phones will ring simultaneously when you receive a call. As on the *Ring your phones in order* option, you can add or delete the phones which will ring. Your phones will ring until you answer one of them, or until another call service kicks in, for example Delayed Call Forwarding, or until the call is rejected or sent to voicemail.

If you select *Forward to another phone*, you can configure the phone that should ring.

Forwarding incoming calls

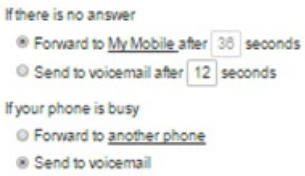


- Click the link to enter the phone number.
- Tick the checkbox if you want to be notified when calls are forwarded.
- If you configure call forwarding here, incoming calls are no longer under Business Call Manager control, so your Delayed or Busy call forwarding settings will be disabled.

Call forwarding settings

You can also use the Phone Status panel to configure your Delayed and Busy call forwarding settings. If your system supports integrated call forwarding, any changes made here will automatically be replicated on any other devices associated with your CommPortal account.

Call Forwarding Settings



- Use the text box to type in the number of seconds that your phone should ring before it is either forwarded to another number or the call is rejected.
  - If you have configured a ringing order for your phones, you must ensure that this is longer than the total length of time set for the ringing sequence.
- Use the radio button to choose what should happen if you do not answer your phone within the configured time.
  - If you choose to forward the call, use the link to set or change the forwarding number.
  - If you do not have a voicemail service, *Send to voicemail* will read *Reject Call*.
- Use the radio button to choose what should happen if you are already on a call when another call comes in.

Configuring Advanced Settings

The panel on the right of the Business Call Manager screen includes icons for a number of advanced call services.

Advanced Settings panel



You can see the status of these call services at a glance:

- Clicking on a service turns it on and off.
  - Services that are active are shown in bold.
  - Services that are disabled are grayed out and have a slash through the icon.
- Services that are not active, or are active but are being overridden by another service have a warning icon.
  - Hover the cursor over the icon to see a pop-up that explains why a service is being fully or partially overridden.

Depending on which services you have, you can configure the following Call Services on this panel. For some of these services, you will create a list of callers whose calls will trigger the service or enter a call forwarding number.

Forward Selected.

- Click on *forwarding list* to configure the list of numbers whose calls you want to forward.
- Click the link on the phone number to set or change the number that calls from these callers will be forwarded to.

Reject Selected.

- Click on *rejection list* to set up the numbers where calls should immediately be rejected.

Distinctive Ringtone

- Click on *distinctive ringing list* to enter any phone numbers which should ring your phone(s) with a different ringtone.

Forward if unavailable

- Click the link to set or change the number that calls will be forwarded to if your line is unavailable, for example because your phone is unplugged or has lost power.

Anonymous Callers

- When enabled, calls from an unknown number will be rejected without going to voicemail.

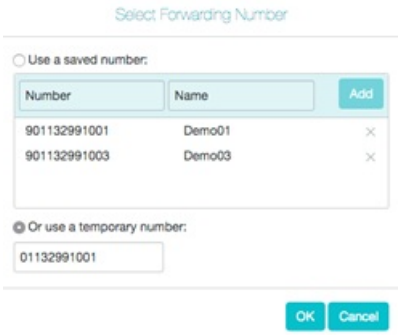
Selecting Forwarding Numbers and Creating Caller Lists

Many settings in Business Call Manager allow you to create a list of callers or enter a call forwarding number. The interface for doing this will be the same for each service that you are configuring.

Selecting Forwarding Numbers

Many BCM settings require you to click a link to enter a call forwarding number. You can create a single list of call forwarding numbers that can then be used every time you want to configure a service that uses one of these numbers. The first time you click on one of these links, you will see a pop-up explaining the benefits of creating this forwarding number list.

Select Forwarding Number

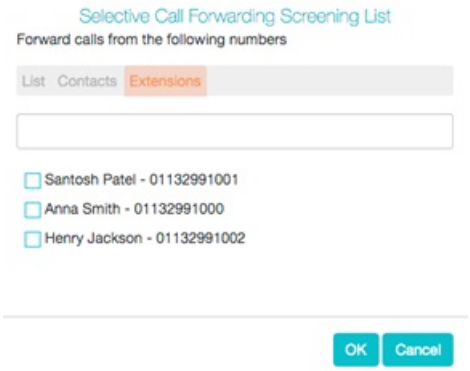


- To add a number, enter the Number and Name in the input boxes, and click Add.
- To delete a number from the list, click x alongside the entry.
- When configuring a call forwarding service, either select the number in the list that you want to use or enter a temporary number, and then click **OK**.

Creating Caller Lists

Many BCM settings require you to create a list of callers to whom the call forwarding behavior will apply. You will create a different list for each call service but the method of compiling the lists is the same for all services.

Caller List example



- You can add someone to a list by typing their number in the input box and clicking **Add New**.
  - If you know someone is in your contact list, you can simply enter their name or number in this input box to search for them in your Contacts. BCM will display matches as they occur.
- You can delete a number by clicking the trash icon on the right, or select **Clear List** if you want to remove all the

numbers currently on the list.

- You can also select people directly from your Contact or Extensions lists by clicking those links and ticking the checkbox(es) alongside the entries you want to include.
- You will see the warning icon if you add a caller to a list that would create interaction conflicts with other lists.
  - Click on the icon to see why there is an issue.
  - You can choose whether or not to resolve the issue, for example by deleting the contact from the conflicting list. However, if you do not resolve it, then unexpected call handling behavior may occur.

Groups

The Groups page shows you all of the groups that your phone line is in.

Hunt Groups (Multi Line Hunt Groups - MLHG)

There are a number of different types of groups:

- **Hunt Group**, also called a **Multi Line Hunt Group (MLHG).** When a call comes in to a Hunt Group, each line in the group is rung in turn until someone answers the call. Depending on how your administrator has set up your Hunt Group you may be able to log in and out of the Hunt Group. When you're logged in calls to that Hunt Group will ring your phone. When you're logged out they won't.
- **Call Pickup Group**. If your phone line is in a Call Pickup Group then you can pick calls that are ringing on any other lines in that group by picking up your phone and dialing the Group Call Pickup code.
- **Sim-Ring Group**, also known as a **Multiple Appearance Directory Number (MADN)**. This is a special phone number that, when called, will ring all of the phones within the Sim-Ring Group. The first person to answer their phone will take the call, at which point all the other phones will stop ringing.

Viewing Hunt Groups

If your phone line is in a Hunt Group then there will be an entry in the Group Membership section for it called *Hunt Group:**name***. Click on this entry to view information for that Hunt Group:

Groups – Multi Line Hunt Groups



The following information is shown on the right hand panel of the screen:

- What department this Hunt Group is in, if any. If your business does not use departments then this will say None.
- How many lines are in the group, and how many are logged in.
- Whether you are currently logged in.
- Details of each of the lines in this group and whether each line is currently logged in. Your line will be in this list.

Using Hunt Groups

Calls that come into your phone line from a Hunt Group will ring your phone as normal, and you can answer the calls as you usually would.

If you have permissions to log in and out of the Hunt Group you can either use CommPortal to log in and out, or you can use your phone.

Using CommPortal

To log into the Hunt Group using CommPortal click on Login. Your line will be marked in the list with

To log into the Multi Line Hunt Group using CommPortal click on Logout. Your line will be marked in the list with

Call Pickup Groups

Viewing Call Pickup Groups

If your phone line is in a Call Pickup Group then there will be an entry in the Group Membership section called *Call Pickup Group: **name***. Click on this entry to view that Call Pickup Group:

Groups – Call Pickup Groups



The following information is shown on the right hand panel of the screen:

- The department this Call Pickup Group is in, if any. If your business does not use the departments then this will say None.
- The number of lines in this Call Pickup Group.
- The lines which are members of this Call Pickup Group. Your line will be in this list.

Using Call Pickup

To pick up for a call that is ringing on another phone in your Call Pickup Group, follow these steps:

1. Pick up your phone handset.
2. Dial the Call Pickup access code: *11.

Alternatively, if two or more phones are ringing and you want to pick up the call that is ringing on a particular extension number, follow these steps:

1. Pick up your phone handset.
2. Dial the Directed Pickup access code: *12.
3. Dial the extension number on which the call is ringing.

Multiple Appearance Directory Numbers (MADN)

If your phone line is in a Multiple Appearance Directory Number group then there will be an entry in the Group Membership section for it called *Sim-Ring Group: **name***. Click on this entry to view that Sim-Ring Group:

The following information is shown on the right hand panel of the screen:

- What department this Sim-Ring Group is in, if any. If your business does not use departments then this will say None.
- How many lines are in the group.
- The lines which are in this group. Your line will be in this list.

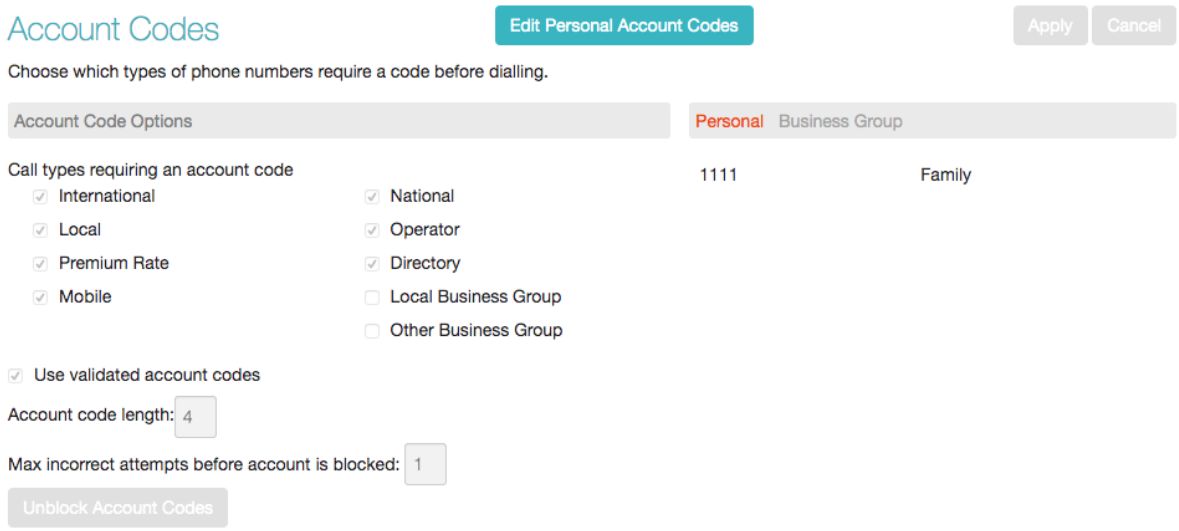
Only an administrator can make changes to a Sim-Ring Group.

Account Codes

If you have account codes configured on your line then once you have dialed a number which requires a code, you will hear a tone. You will then need to dial a special code before the call is connected. Your system may use either validated or non-validated account codes. If your system uses validated account codes then you must enter a specific code that has been configured either by your administrator or by you. If your system uses non-validated account codes you can enter any code so long as it is the right length. If you have account codes your administrator should have explained this to you and told you what codes to use

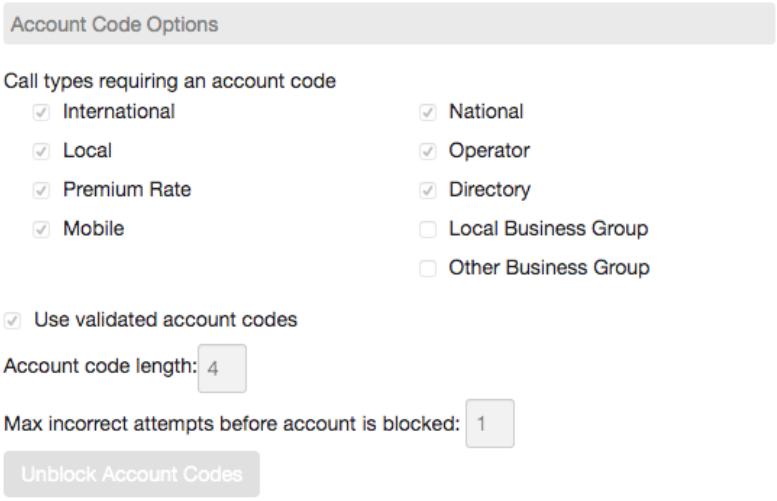
Account Codes

The Account Codes screen lets you configure your account codes service. Exactly what is configurable within this section will depend on the permissions that your administrator has given you.



Account Code Options

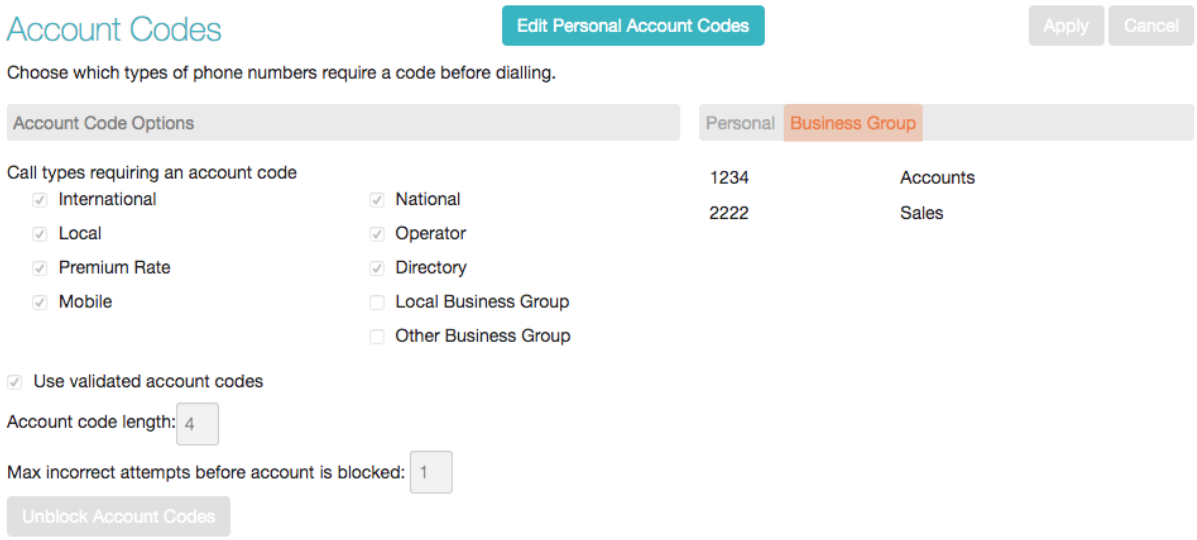
The Account Code Options window shows you the settings which your administrator has set up for the account code service.



- Call types requiring an account code show you the types of calls which will require you to enter a code once you have dialed the number. In the example above, account codes are only required for International calls.
- Use validated account codes specifies whether your system uses validated or non-validated account codes.
- Account code length specifies the length of account codes you must enter.
- Max incorrect attempts before account is blocked specifies how many incorrect attempts to enter account codes are allowed in a row, before all calls requiring account codes are blocked.

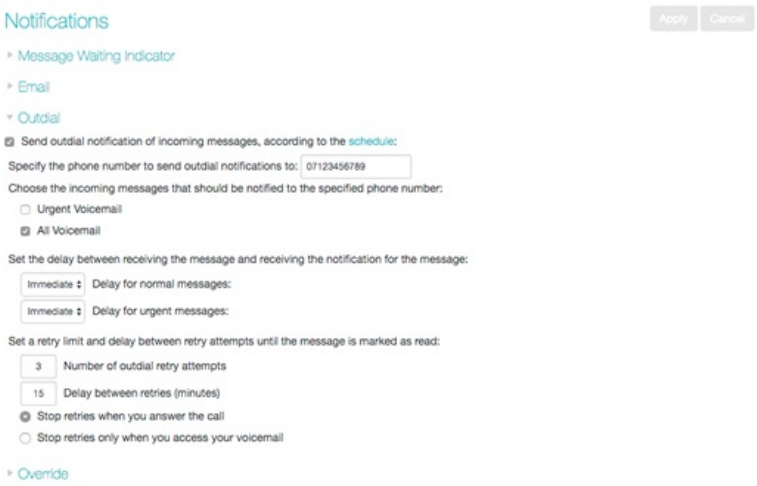
Business Account Codes

To view the list of valid account codes for your business, click on the Business Group link



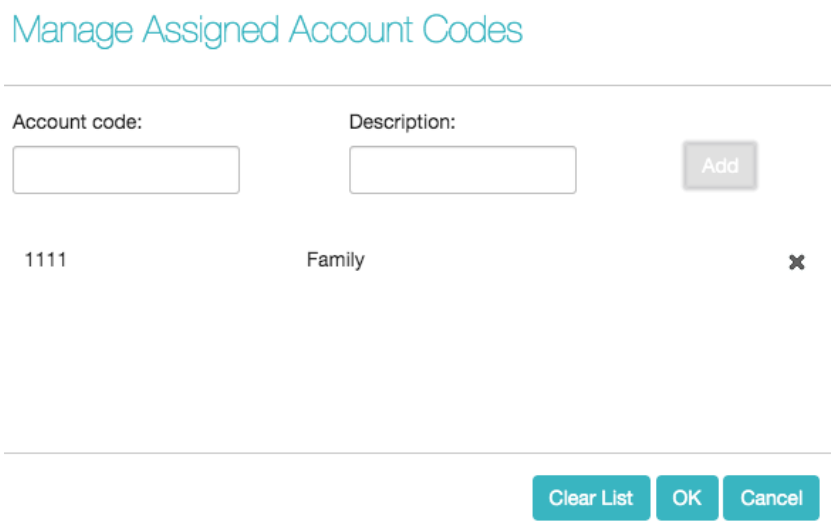
Personal Account Codes

To view your personal list of valid account codes, click on the Personal link:



If you have permission to edit your list of valid account codes, click on Edit Personal Account Codes.

Editing personal account codes



- To add an account code, follow these steps:
  1. Enter an account code in the Account Code text box.
  2. Enter a description for the code in the Description text box.
  3. Click on Add.
  4. Click on OK.
  5. Click on Apply.

- To delete an account code, follow these steps:
  1. Click on the **X** icon to the right of the account code.
  2. Click on OK.
  3. Click on Apply.

- Alternatively, to delete all of your account codes, follow these steps:
  1. Click on Clear List.
  2. Click on OK.
  3. Click on Apply.

Unblocking Account Codes

If your phone line is configured to use account codes, and an incorrect account code is entered too many times when making calls, your service will be blocked.

To unblock your line please contact your Administrator.

Settings

There are a number of screens within the CommPortal interface where you can configure the settings for your Pod Connect phone system.

Personal Details and Security

The bottom panel of the CommPortal UI displays information about your account and allows you to configure or change settings, including your password or PIN. You can also use this tab to configure a SIP desk phone.

Personal Details and Security settings



The page is divided into the following panels.

Personal Details

The Personal Details panel shows you information about your line:

- The name this line is configured as. Your administrator can change this if it is incorrect.
- The name of the department the line is in. If departments are not used in your business, this will say **None**.
- Whether you are an administrator, and if so, for which department.

Devices

The Devices panel shows you the phones and other devices that you currently have configured for your account. If you have a SIP desk phone, you can use the Devices panel to configure settings for it by clicking on set keys next to its number. This will launch the Phone Configurator.

Note that, if you have a business mobile phone associated with your account that you use alongside your desk phone, you cannot see any details of this business mobile in CommPortal.

Allocated Licenses

If you have any licenses for creating Large Meetings or Webinars, you will see the *Allocated Licenses* link that allows you to see what licenses are currently allocated to your line.

Security

The Security panel allows you to change your password, Call Services PIN or Voicemail PIN.

In some systems, passwords and PINs may be checked to ensure that they are strong enough to prevent a malicious user guessing your password. For example, you may be prevented from using your phone number, or having consecutive or repeated numbers and/or letters. If your chosen password fails these checks, it will be rejected and you will see an error message explaining why you cannot use it.

To change your CommPortal password, follow these steps:

1. Click the **Change Password**
2. Enter your current password in the Current password text box.
3. Enter your new password in the Password text box.
4. Enter your new password in the Confirm password text box.
5. Click on **Confirm**.

You have two different PINs.

1. Your Call Services PIN, which you use to access Remote Access to Call Forwarding and to validate changes to some call services.
2. Your Voicemail PIN, which you use to access your Voicemail.

To change either of these PINs, follow these steps:

1. Click the **Change Call Services/Voicemail PIN**
2. Enter the new PIN in the New PIN text box.
3. Click on **Confirm**.

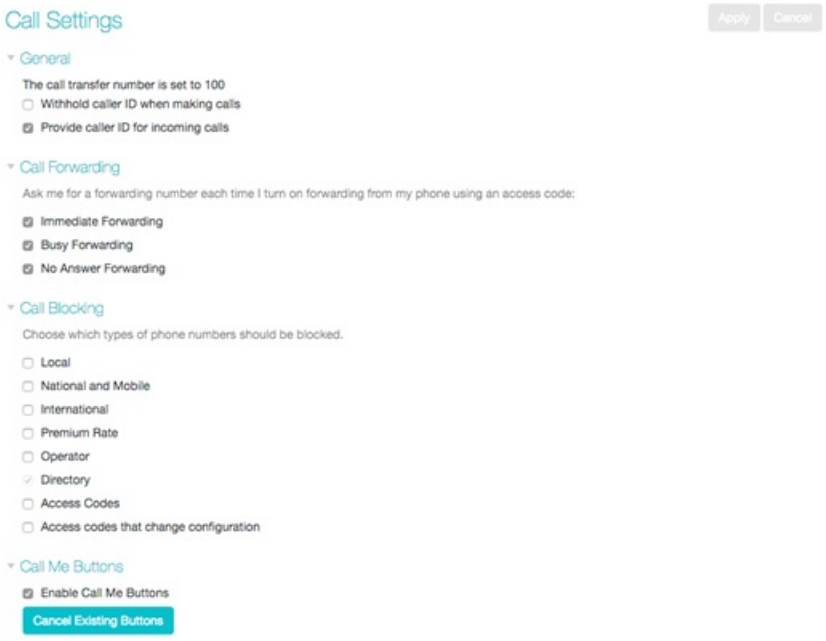
If your service provider has enabled this setting, you can also use a *Change Account Email* link to edit your account email address. This address is used for

- notification emails that are sent every time your voicemail PIN, CommPortal password, or the email address is changed
- password reset emails that are sent if you click the forgotten password link on the CommPortal login screen.

Call Settings

The Call Settings screen allows you to configure your call service options.

Call Settings tab



The General panel enables you to configure call settings, including caller ID options.

The Call Forwarding panel lets you configure whether, when you dial the Call Forwarding access codes to enable Call Forwarding, you need to enter a phone number. If you don't want to enter a phone number then your Call Forwarding service will use the number you last configured through CommPortal.

To change whether you need to enter a number when enabling Call Forwarding from your handset, follow these steps:

- Check (to require a number to be entered) or uncheck (to mean a number is not required) the type of Call Forwarding you want to change.
- Click on **Apply**.

The Call Blocking panel lets you configure what types of outgoing calls should be blocked from your line:

To block certain types of call, follow these steps:

- Check the type of call you want to block.
- Click **Apply**.

To unblock a type of call, follow these steps:

- Uncheck the type of call you want to allow.
- Click **Apply**.

The remaining panels on this page relate to particular call features. You will only see these panels if you have access to these services.

Call Me Buttons

The Call Me Buttons panel allows you to enable or disable your Call Me service and to cancel your existing buttons. If you disable the buttons by un-checking the *Enable Call Me Buttons* checkbox, potential callers who attempt to call you,

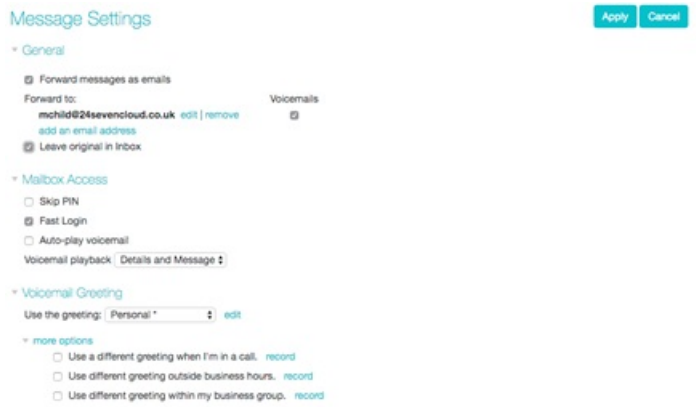
for example by using a Call Me button that you had already included in an email, will see a message stating that the service is not currently available.

You can permanently disable all of your existing Call Me Buttons by clicking on *Cancel Existing Buttons*. If you want to reactivate the Call Me service in future, you will need to recreate and redistribute your Call Me buttons.

Message Settings

The Message Settings screen lets you change the operation of your voice and fax messaging service, and has a series of sections.

Messages tab



- General lets you configure some general messaging settings.
- Mailbox Access lets you configure your voice mailbox.
- Voicemail Greeting lets you configure your default and alternative greetings.

General

You can use the General panel to do the following.

- Configure how many seconds must pass before incoming calls are forwarded to your voicemail.
- Enable or disable Live Message Screening, voicemail transcription or video messaging (if you have access to these features).
- Enable auto-forwarding of your voicemail messages by email. You can add destination e-mail addresses by clicking on the add an email address link. You will then be able to manually add an address or choose from your existing contacts.

You can also choose whether you want to leave a copy of any forwarded messages or faxes in your inbox or whether they should be deleted.

Additionally, you can configure whether or not to include action links in the outgoing message. Clicking on action links allows you to log in to your account, mark messages as read (deactivating any message waiting indicators), or even delete them.

Once you have made any changes, you should click Apply to confirm your choices.

Mailbox Access

You can use the Mailbox Access panel to:

- configure your mailbox so that it does not require you to enter a PIN when you collect your messages
- configure your mailbox so that it logs you directly into your mailbox when you collect your messages
- configure your mailbox so that it automatically plays your new messages when you've logged in
- determine the content that is played back when you access your voicemail (the details, the message or both)
- determine the order that messages are played back in.

Once you have made any changes, you should click Apply to confirm your choices.

Voicemail Greeting

You can use the Voicemail Greeting panel to:

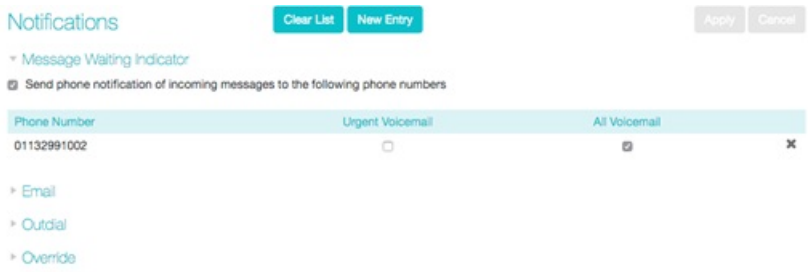
- select your default greeting
- specify when alternative greetings should be used and the behavior when a greeting expires
- record or upload additional audio greetings, for example greetings to be used out-of-hours or during an extended absence
- override your default greeting with a temporary greeting for a defined period of time.

Once you have made any changes, you should click Apply to confirm your choices.

Notifications

The Notifications tab allows you to set options for how you wish to receive notifications whenever a new message arrives for you.

Settings – Notifications tab



Message Waiting Indicator

The Notifications page automatically displays the MWI section where you can configure whether your phone should indicate to you when you have new messages of a particular type.

To have all new voice messages activate your phone's messages indicator, follow these steps:

1. Check All Voicemail.
2. Click on **Apply**.

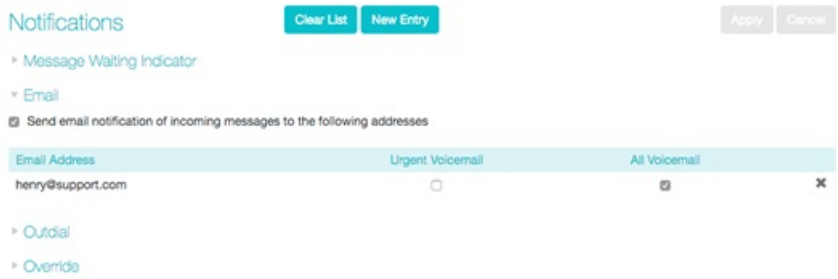
To have only urgent new voice messages activate your phone's messages indicator, follow these steps:

1. Check Urgent Voicemail.
2. Click on **Apply**.

Email Notifications

Expand **Email** to configure Email notifications, which notify different email accounts when different sorts of messages are waiting.

Notification settings – Email tab



To add an email address to be notified, follow these steps:

1. Click on **New Entry**:
2. Enter the email address.
3. Click on **Add**.
4. Check whether you want All Faxes, Urgent Voicemail, or All Voicemail sent to this address.
5. Click on **Apply**.

To delete an email address from this list, follow these steps:

1. Click on the Cross icon to the right of the email address: .
2. Click on **Apply**.

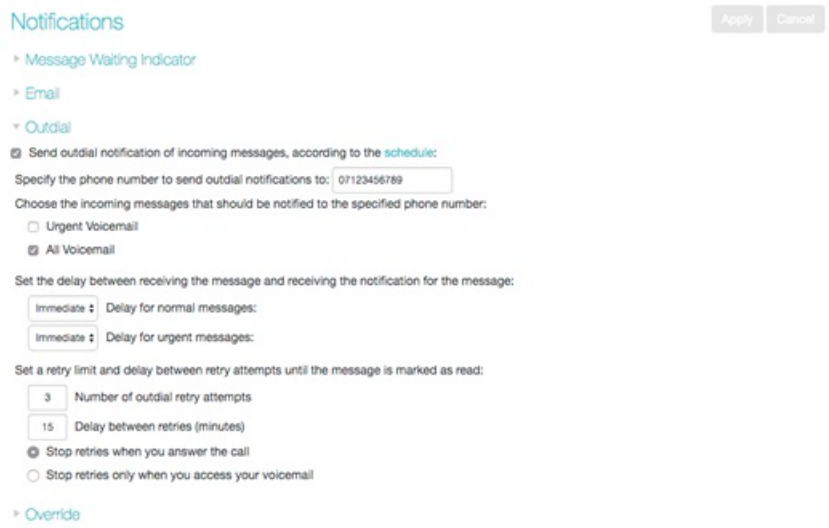
To delete all email addresses from this list, follow these steps:

1. Click on **Clear List**.
2. Click on **Apply**.

Outdial Notifications

Expand **Outdial** to configure a telephone number that will be called whenever a new message arrives in your account. This is a telephone number that is not currently associated with your account.

Outdial Notifications



On this screen, you can:

- enable or disable the Outdial notifications by clicking the box on the left-hand side. When Outdial notifications are disabled, the rest of the screen will be grayed out and you will not be able to make any changes to the configuration without enabling Outdial notifications first.
- choose which events – Urgent Voicemails, All Voicemails – will trigger a notification to your chosen number
- enter or modify targets for notification types.

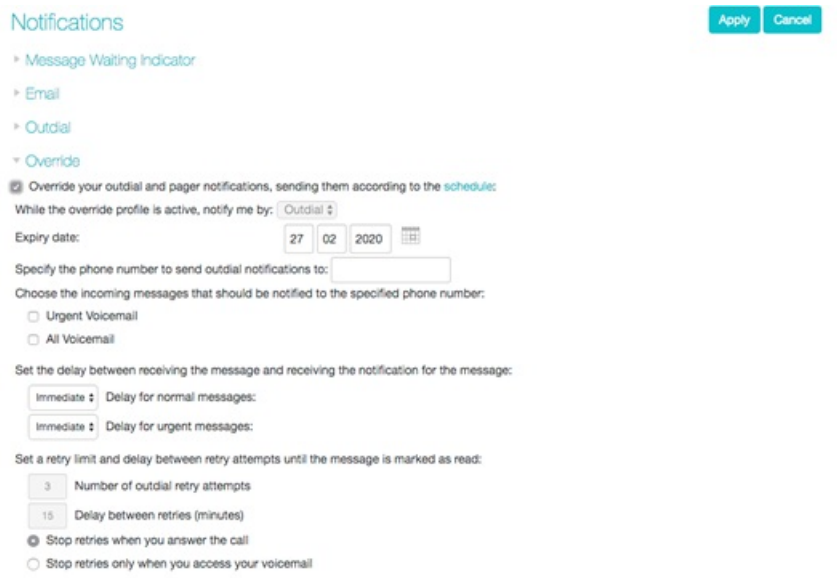
You can also

- configure a schedule containing periods when outdial notifications are sent – during inactive periods (for example overnight) any unheard message will still activate the MWI, but the outdial notification is postponed until the next active period in the schedule
- control the delay between receiving a message and sending out a notification
- control how many times, and at what interval, the system will retry a call if the notification is not acknowledged
- control what you have to do to acknowledge the notification: simply answer the outdial call, or proceed to access your voicemail. The second option prevents a notification being lost by an outdial call being picked up by an answering machine or by someone else.

Override Notifications

Expand **Override** to override the schedules that you have configured for your pager and outdial notifications and send notifications according to an override profile.

Notification settings – Override tab



Using the Override tab, you can

- enable or disable the override profile by clicking the box on the left-hand side. When the override profile is disabled, the rest of the screen will be grayed out and you will not be able to make any changes to the configuration without enabling the override profile first.
- determine what date the override profile will expire
- enter or modify targets for notifications
- choose which events – Urgent Voicemails or All Voicemails – will trigger a notification to your chosen number.

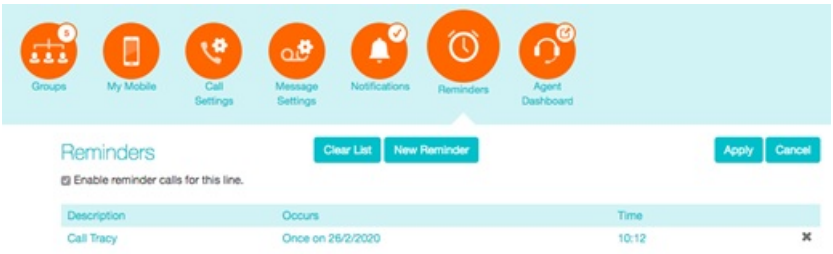
You can also

- configure a schedule containing periods when outdial notifications are sent – during inactive periods (for example overnight) any unheard message will still activate the MWI, but the outdial notification is postponed until the next active period in the schedule.
- control the delay between receiving a message and sending out a notification
- control how many times, and at what interval, the system will retry a call if the notification is not acknowledged
- control what you have to do to acknowledge the notification: simply answer the outdial call, or proceed to access their voicemail. The second option prevents a notification being lost because the call was picked up by an answering machine or by someone else.

Reminders

The Reminders screen lets you set up reminder calls.

CommPortal Reminders page



Adding Reminders

To add a new reminder, click **New Reminder** at the top of the screen and then follow these steps.

1. Enter a description of the reminder.
2. Select the phone number on which you will receive the reminder call.
3. Select whether you want a one-off or recurring reminder using the drop-down.
4. Enter the date (for one-off reminders) and time you would like the reminder call using the Time boxes and dropdown list.
5. Click on Play/Record to record and then playback your reminder message.
6. Click on Add.
7. Click on Apply.

Deleting Reminders

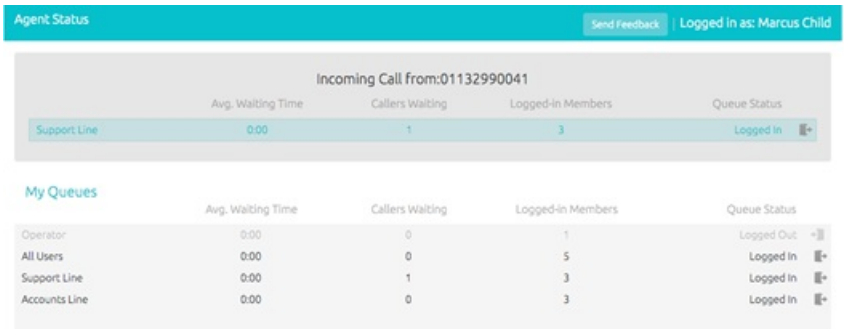
To delete a reminder, you use the Reminders list:

- To delete a single reminder, follow these steps:
  1. Click on the trash icon to the right of the reminder in the list.
  2. Click on **Apply**.
- Alternatively to delete all of your reminder calls, follow these steps:
  1. Click on **Clear List.**
  2. Click on **Apply**.

Using the Agent Dashboard

If you have the Integrated ACD feature, you will see an icon and a link to the **Agent Dashboard** on the CommPortal Home page, so that you can easily access the screen where you can see details of the current status of your Queues, and the details of any incoming calls.

Agent status screen



This screen

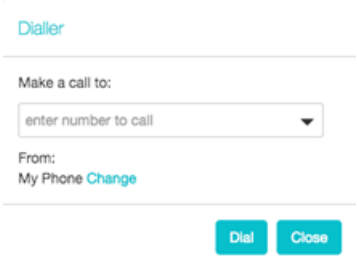
- shows statistical information on the Queues (Hunt Groups/MLHGs) that you belong to
- displays caller information when you receive an incoming call, if you are able to see incoming call pop-ups
- enables you to use the gray icons to log in and out of Queues, if you are allowed to log out of your Queues.

For more information on using Integrated ACD, please see the Integrated ACD End User Guide.

Click To Dial

You can make a phone call from within CommPortal by clicking on the **Make Call** button at the top right of the screen. If you have Meeting, this option is found under the **Start** drop-down shown instead of the **Make Call** button.

This launches the dialler where you can enter the number you want to dial and choose which phone number will be used to make the call:



- Enter the phone number or contact's name in the box. As you type, you will see all matching entries from your contacts. You can also use the drop-down to select one of your contacts.
- The Dialer will display your main phone number.
  - Click **Dial** to make the call using this number.
  - Click **Change** to select one of the other phone numbers associated with your account, or enter a new number and then click **Dial**.
- Your phone will then ring.
- When you answer it, the number you are calling will be rung and you will see a pop-up notifying you that this is happening.
- Once your call is connected, you will see a pop-up with details of the call. You can click **End Call** when you want to end the call.

Configuring Your Phone's Keys

You configure your phone's keys using the Phone Configurator. To launch the Phone Configurator, follow these steps:

1. Click on **Devices** under Personal Details in the CommPortal.
2. Select the phone and click on **Set Keys**. This launches a new browser window for the Phone Configurator.
3. Click Edit on the phone that you would like to configure.

Using the Phone Configurator (Endpoint Pack)

Once you have launched the Phone Configurator you will be presented with an image of your phone on the left and the configurable keys on the right.

Modifying a phone profile



The examples shown in this document show a Yealink T46S. Your phone model may differ from the one shown.

- Click the arrows alongside the headings in bold to expand the menus and expose the keys that can be configured.
- Use the drop-down menus alongside each key to select the function that you want to add to this key.
- For some phone models, some settings may be grouped together into 'hotspots', which allow you to display only the keys within the hotspot in the panel on the right hand side of the screen.
- Hover your mouse over the phone image to see if there are any hotspots.
- If a hotspot appears, click on it to access the settings for these keys.
- Click on another region of the phone image to restore the full list of settings on the right-hand side.

You may be able to configure the following options for the keys on your phone (although not all of these options may be enabled on your phone system):

- None – this is used when a key is not assigned a function.
- Line – this key is used for your phone line. Pressing this key will cause the phone to go off-hook and ask you for digits to dial. When calls come into that phone line, this key can be used to answer those calls.
- Speed Dial – this configures the key as a speed dial
  - Enter the number you want this Speed Dial to call in the box provided.
- Do Not Disturb – configures the key as a Do Not Disturb key
- Monitored Extension – allows you to monitor another line
  - Enter the number of the extension you want to monitor in the box provided.
- Other Service – this is reserved for future services.
- Park Call – this is used to park calls as described
- Retrieve Parked Call – this is used to retrieve parked calls
- Automatic Recall – this sets up the key as a speed dial to call the Automatic Recall access code.
- Call List – this configured the key to show you recent calls.
- Directory – this configures the key to provide you with the phone's list of contacts
- Intercom – this configures the key to launch a paging call
- Services – this configures the key to provide to access to services configured on your phone.
- Voicemail – this configures the key as a speed dial to access your Voicemail.

- Last Caller ID Erasure – this configures the key as a speed dial to call the access code which clears the network list of your recent calls.
- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.
- Trace Call – this configures the key as a speed dial to call the Call Trace service.
- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.
- Group Pickup – this configures the key as a speed dial for the Group Pickup service
- Directed Pickup – this configures the key as a speed dial to pickup calls ringing on a particular line.
    - Enter the number of the extension you want to pick up calls for in the box provided.

Once you have finished configuring your keys, you should save your changes.

- For any changes to take effect your device must be rebooted.

If you do not want to save your changes, click**Discard changes**. This will remove any changes made since the last time you saved your phone's configuration.