# Pod Connect for Mobile and CommPortal Quick Start Guide

Quick reference guide to the CommPortal, Pod Connect for iOS/Android/Desktop


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# Welcome!

This guide is intended to get you up and running with the basic CommPortal and Pod Connect features.
For more in-depth information, please visit the Help sections in the portals once you've logged in.

This guide covers:

**CommPortal** - A web portal used to configure your call services

**Pod Connect for Desktop** - A Windows/Mac softphone for calling, instant messaging, and more

**Pod Connect for iOS/Android** - An iOS/Android app with full featured dialler, instant messaging, and more

**Pod Connect Meeting** - A Windows/Mac application for audio and video conferencing over the internet

# CommPortal

# Getting Started

CommPortal is a web portal used to configure the features on your new phone system.

With CommPortal you can:

- View missed calls
- Listen to voicemail messages
- Manage your contacts
- Set up rules to route your calls
- Change your CommPortal settings

To get started, go to the login page at[https://commportal.connectbetter.net](https://commportal.connectbetter.net)

(Please contact your administrator if you don’t know your CommPortal password)

# Exploring CommPortal

When you log in, you see the CommPortal Home page.

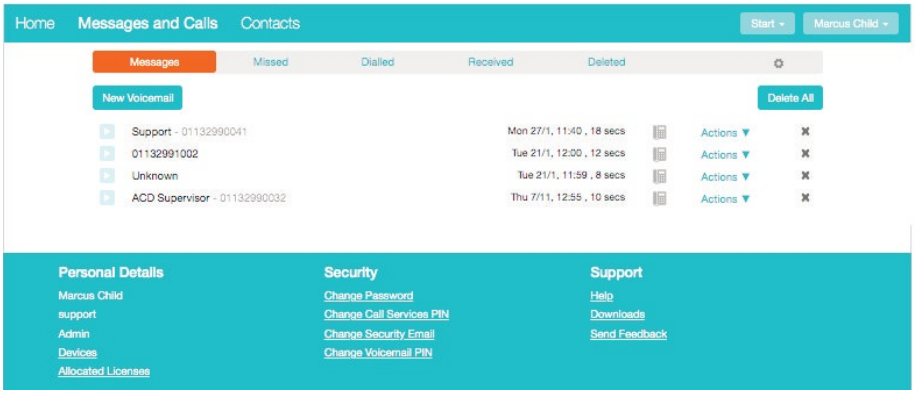



From the CommPortal Home page you can access the following features:

**Messages and Calls** – click this link to view and retrieve any voicemails
**Contacts** – Import your contacts from Outlook or create new ones, then click on a name to dial
**Phone Status** - Control your Call Manager settings
**Make Call** – Make a call direct from CommPortal
**Start Meeting** – Start a Pod meeting
**Manage Webinars** - Create or manage your Pod webinars
**Security** - Use these links to change your password or security email address
**Downloads** – Download apps, for example Pod for Desktop
**Send Feedback** – Report bugs or make suggestions for improvements to the CommPortal interface
**Your Services** – Use these links to access a range of services available with your CommPortal account, for example to change your call, message and notification settings, or set up a Reminder call.

# Messages & Calls

The Messages & Calls page shows all recent call activity.




Use the sub-tabs to view calls based on whether they were **Missed**, **Dialled**, **Received**, **Rejected**, or **Deleted**.

Click the **Play** icon to listen to a voicemail.




- Click the trash icon to delete the voicemail.

- Click  and select: **Reply**, **Mark as new/heard**, **Forward as Email**, **Forward as Voicemail**, or **Save File**.

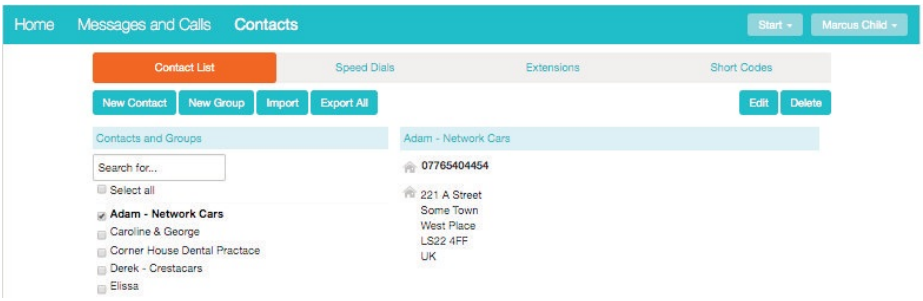
Click the **New Voicemail** box at the top left of the Messages and Calls screen to record and leave a voicemail as a memo (your computer needs a microphone to use this function).

# Contacts

Use the Contacts page to manage your contact details.  This page displays an alphabetical list of your currently configured contacts.

Use the **Search for ...** box to find a particular contact.

Use the checkbox on the left to select a contact and display their details on the right of the screen.



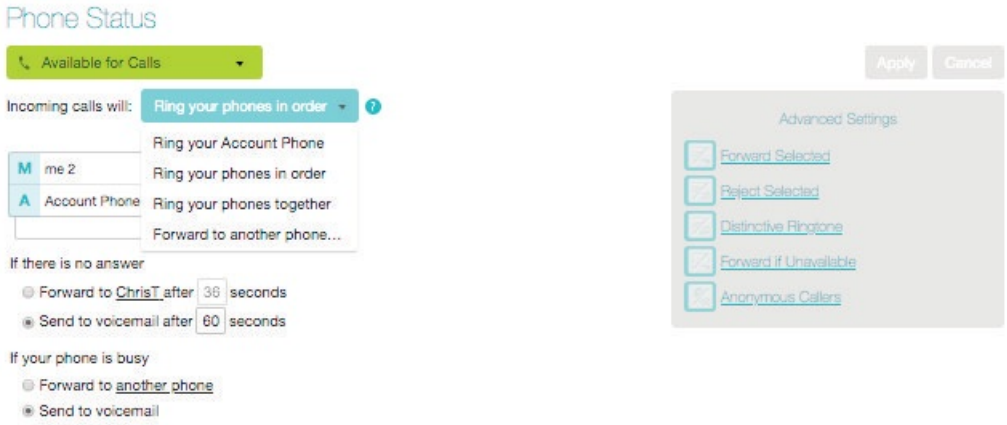

- Click New Contact to create a new contact.

- Click New Group to set up a group of contacts. You can send a message to several subscribers at once by messaging the group. You can also set up call handling rules for a group.

The fastest way to add your contacts to CommPortal is to import them from your email program. If you use Microsoft Outlook, you can export your contacts as a CSV file and use the CommPortal Import button to add these contacts to CommPortal.

# Call Manager

The Phone Status panel at the centre of the CommPortal Home page displays your **Call Manager** that allows you to set your current availability status and manage how incoming calls are handled.

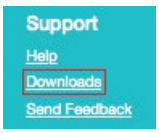



The top section on the left enables you to set your status to **Available** or **Do Not Disturb**, or to **Forward all Calls**.

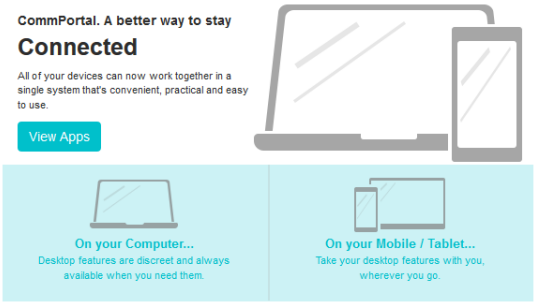
The panel on the right allows you to set up call handling rules for **Normal**, **Anonymous**, **VIP**, and **Unwanted callers**. You can use options on this screen to add numbers to VIP and Unwanted callers lists.

# Apps

Use the Downloads link at the bottom of the CommPortal Home page to launch the Apps page.



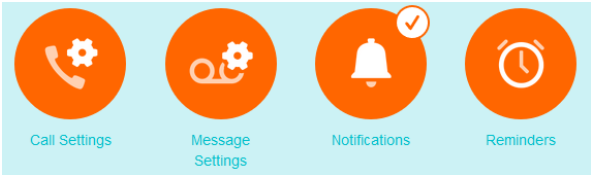

Here you can download applications that allow you to access the features of CommPortal on your computer, mobile phone, and tablet.




- Click View Apps to see a list of the applications available and follow the on-screen instructions to install the app.

# Changing Settings

You can view and change your CommPortal settings directly from the CommPortal Home page, using the following icons.



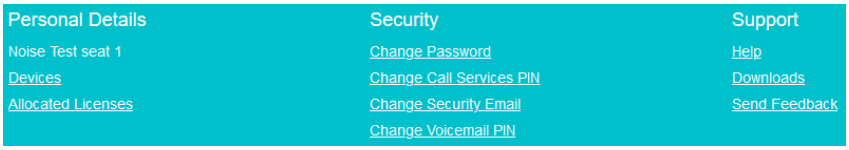

- Click **Call Settings** to configure your call services, select how caller ID is displayed, and enter details for Call Forwarding, Call Blocking and Call Jump.

- Click **Message Settings** to control how your messages are handled, configure Mailbox Access settings, and record a Voicemail Greeting.

- Click **Notifications** to set up how you will receive notifications whenever you receive new messages.

- Click **Reminders** to set up single or recurring call reminders.

On the bottom panel, you can view your account information, change your security settings, and configure your phone keys.




- Click **Devices** and then select ‘set keys’ to configure your desk phone.

- Click **Change Password** or **Change Call Services PIN** to set a new password.

- Click **Send Feedback** to launch a pop-up where you can report any bugs with the CommPortal interface or send a suggestion for improvements or new features.

# Pod Connect for Desktop

# Getting Started

Your Pod phone service can be used to make or receive calls from your desk phone, your PC or Mac, and your mobile devices.

For this to work on your desktop, you need to install the Pod for Desktop software on your PC or Mac. This guide will help you to do that.

## Ensure Your Computer is Compatible

Pod for Desktop works on PCs running Windows 7 or Windows 8. It also runs on Macs that have OS X 10.7 or later versions.

You can use your computer’s built-in microphone and speakers, but you will have much better audio quality if you use a headset. Pod works with most common headsets, including Bluetooth. It will even work with the answer/reject call button on some headsets.

## Your Password

You will need your Pod CommPortal phone number and password to start using Pod for Desktop. If you don’t have this information, contact your administrator.

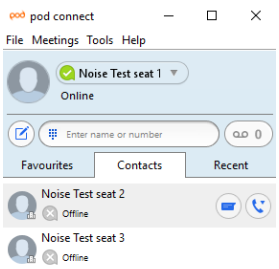
## Download and Install the Software

Download Pod for Desktop from https://commportal.connectbetter.net

When prompted, save the file. Find the file in your downloads folder, open it, and follow the on screen instructions to install the software.

# Exploring Pod Connect forDesktop

Pod Connect for Desktop is like having your desk phone on your computer. You can make and receive calls, hold calls, transfer calls, and make three-way calls.




You can also use Pod Connect for Desktop to send instant messages, transfer files, and send presence information to other people in your corporate directory who are using Pod on any device.

Pod Connect for Desktop uses the Wi-Fi, broadband, or mobile data services connected to your computer.

# Making & Receiving Calls

## Making Calls

Making a call is as easy as entering the number on the keypad or clicking on a contact's call button.

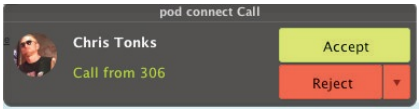
If your contact has more than one number, you can choose which number to call from the drop-down list.

If the person you are calling has caller ID, they will see your individual phone number.

## Receiving Calls

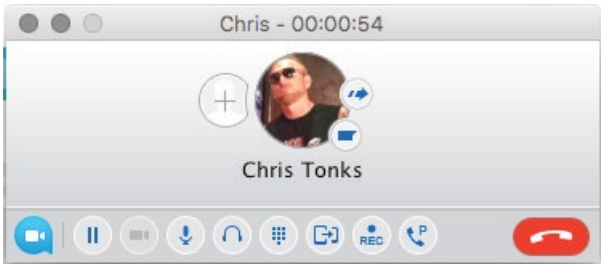
When someone calls your Pod number, you will see a pop-up window appear on your computer screen and hear a ringing tone through your speakers or headset.

The pop-up shows the number of the person calling you.
If that person's details are already in your contacts list, the pop-up displays the caller's name.




Depending on the other services you have with Pod, you may see the incoming call on your desk phone, on your mobile phone, or on a tablet device. You can answer the call on whichever device is most convenient for you.

## During the Call




While a call is in progress you can use the call window to:
1. Add a participant
2. Transfer the call
3. Perform a CRM look-up
4. Put the call on hold
5. Send video
6. Mute your microphone
7. Adjust the volume
8. Access the keypad
9. Record the call
10. Merge calls
11. End the call

You may receive a call while you are already on another call. If you answer the new call, the current call is automatically placed on hold and the new call appears in a new call progress window.
Switch between the two calls using the window for each one, or click on the **Merge calls** icon to merge other callers into a single call.

## Video Calling

If the person you are talking to is also using Pod on the same network, you can upgrade your call to video at any time. Click on the Video icon to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the Video icon at any time to turn off your video feed.

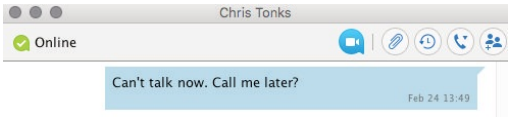
## Send the Call to Someone Else

Use the Call Transfer icon to send any call to another number.
A menu will pop-up allowing you to select a contact, or you can type in a completely new number to transfer the call to.
You can also transfer the call to another of your devices that has Pod installed, without having to hang up!

# Instant Messaging

If you have Pod for desktop with Instant Messaging, click on a contact’s Chat icon to send them an instant message.

From within the chat window, you can send files, view your chat history with the contact, call the contact, and add one or more participants to the conversation.



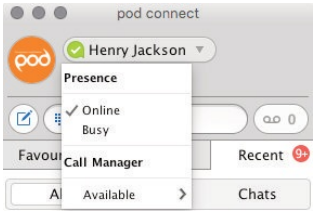

## Reject Call with IM

If the caller is in your Contacts list, you can reject a call and send the caller an instant message explaining why you can’t take the call.
Click on the drop-down list next to Reject and select one of the system messages, or click Custom Message to type your own message.

# Presence & Call Manager

## Presence

Let others know whether you are available or busy by setting your presence to **Online** or **Busy**.




Your Presence information automatically shows when you are **Away**, **On the Phone**, or **In a Meeting** (this references the information in your Outlook calendar).

## Call Manager

You can tell Podr how to handle your incoming calls. Click on the **Presence** selector, expand the **Available** option and choose between:

Available

Do Not Disturb

Forwarding

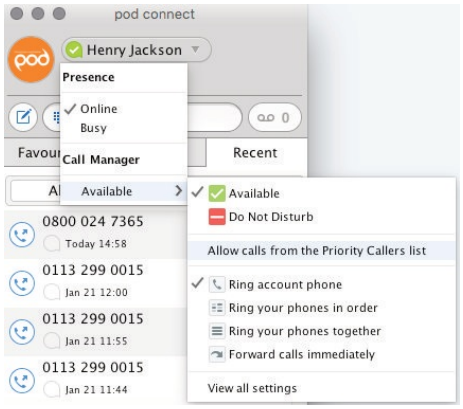
If **Do Not Disturb** is selected, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring until you turn off Do Not Disturb, so be sure to use it carefully!

You can select **Forwarding** to forward all incoming calls to another number. You are then prompted to enter the number you want to forward calls to.

Note that when you change your Presence or **Call Manager** settings, the change applies on all of your Pod devices. So if you step away from your computer and forget to update your status, you can change your status using the Pod app on your mobile phone instead.

## Choosing Which Calls to Receive

You can specify how calls should be handled if they are from anonymous numbers, from VIPs, or from numbers on your Unwanted Callers list.



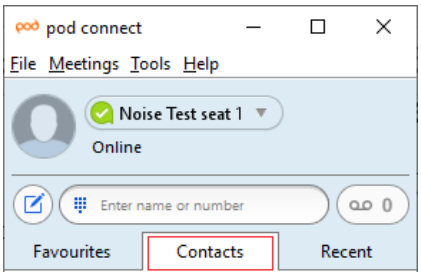

To do this, click on the **Presence** selector, expand the **Available** option, and select the **View all settings** option at the end of the menu.

This opens the **Call Manager Status** window, where you can set your call handling preferences.

# Contacts & Favourites

## Your Contacts List

Pod for Desktop assembles a contact list for you to use.




Depending on how your service is set up, the contact list may include:

- Contacts that you type directly into Pod for Desktop
- Contacts in the Outlook or Mac local address book stored locally on your computer
- Contacts in CommPortal contacts
- Contacts in your corporate directory

## Favourites

For quick access to frequently-called people, add the contact to your Favourites list.
Use the right-hand mouse button to click on any contact and choose **Add to Favourites** from the drop-down list.
Favourites appear in the Favourites list and in the Contacts list.

# Visual Voicemail

If you have a voice or video message, the**Message** button changes colour and indicates the number of messages received.




Click this button to see a list of messages received, to see transcriptions of the messages into text (where available), or to listen to the messages.

# Emergency Calls

Pod lets you make calls from anywhere on the most convenient device.

If you place a 999 call from Pod, the 999 operator may not be able to identify where you are calling from.

# Pod Connect for iOS/Android

# Getting Started

Your Pod phone service can be used to make or receive calls from your desk phone, your PC or MAC, and your mobile devices. For this to work on your mobile or tablet, you need to install the Pod for Mobile app. This guide will help you to do that.

## Ensure Your Device is Compatible

Pod for Mobile works on:

- Android phones and tablets with ARM chips running 2.3.3 (Gingerbread) or later version.
- iPhone 3GS, 4, and 4S and iPad running iOS5 or later

Video calling only works on devices that have a front facing Camera.

## Find Your Password

You will need your Pod CommPortal phone number and password to start using Pod for Mobile. If you don’t have this information please contact your administrator.

## Download and Install the App

Search for **Pod Connect** in Google Play or iTunes and touch **Install** to download the app to your device.

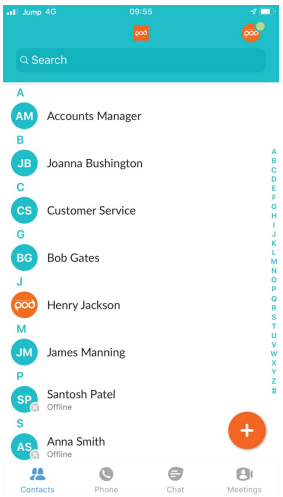
Check the Terms & Conditions and touch **Accept & Continue**.

Tap **Open** on the app and select Pod as your Carrier. Enter your Pod CommPortal Phone Number and Password and tap **Log in**.

If you want to have the ability to switch calls to your own cellular network (for example, if you move to an area with poor Wi-Fi connection during a call made on Pod) enter your own mobile phone number and tap **Continue**.

# Exploring Pod Connect for iOS/Android

Pod Connect for iOS/Android is like having your desk phone on your mobile. You can make and receive calls, hold calls, transfer calls, and make three-way calls. You can even push and pull calls from your phone to other twinned devices, mid-call.




You can also use Pod Connect for iOS/Android to send messages to other people in your corporate directory who are using Pod (on any device).

Pod Connect for iOS/Android uses the Wi-Fi, broadband, or mobile data services available, so you can make and receive calls without using your mobile minutes.

# Making & Receiving Calls

## Making Calls




To make a call, select the **Phone** tab and enter the number you are calling into the Pod keypad, or simply tap on the contact and touch the number you would like to use to call the contact.

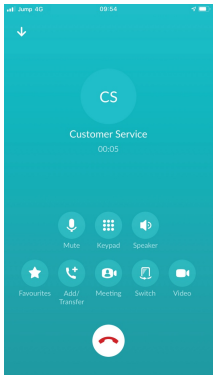
If the person you are calling has caller ID, they will see your individual Pod phone number.

## Receiving Calls

When someone calls your Pod number, the Pod app offers you the choice to accept or reject the call.

Depending on the other services you have with Pod you may also see the incoming call on your desk phone, on your desktop, or on a tablet device. You can answer the call on whichever device is most convenient for you

## During the Call




While a call is in progress you can use the call window to:
- Mute the call
- Switch to keypad
- Speaker phone
- Add/Transfer or place on hold
- Pull to Meeting
- Switch to another device
- Switch to video

You may receive another call while you are already on a call. Pod for Mobile gives you the option to:
- Hold the existing call and answer the new call
- End the existing call and answer the new call
- Ignore the new call

## Video Calling

If the person you are talking to is also using Pod and your phone has a front-facing camera, you can add video to your call any time.
Click on the **Video** icon to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the Video icon at any time to turn off your video feed.

## Switch the Call to Another Device

If the call has poor audio due to an unreliable Wi-Fi or mobile data service connection, you can touch the **Switch** icon and select **This device (cellular)** to move the call to your regular cell phone. Remember that the call will now start to use your mobile minutes.
Alternatively, you can choose to push the call to another of your devices running Pod, such as your desktop or your iPad.
Touch the **Switch** icon and select **Another device** to push the call to whichever device is most convenient.

## Call Pull

You can also pull calls from your other devices onto your mobile. If a call exists that can be pulled, the Pod menu displays a **Call Available to Pull** option. Tap this option and follow the on-screen prompts to pull the call from your other device onto your mobile.

## Transfer the Call to Someone Else

Use the **Call Transfer** icon to send any call to another number. A menu will pop-up allowing you to select a contact, or you can type in a completely new number to transfer the call to. You can also transfer the call to another of your devices that has Pod installed, without having to hang up!

# Instant Messaging

Tap the **Chat** tab to use Instant Messaging. You can then select a contact to send an Instant Message to.
From within the chat window, you can start or continue a conversation, send files, call a contact, or add one or more participants to a conversation.

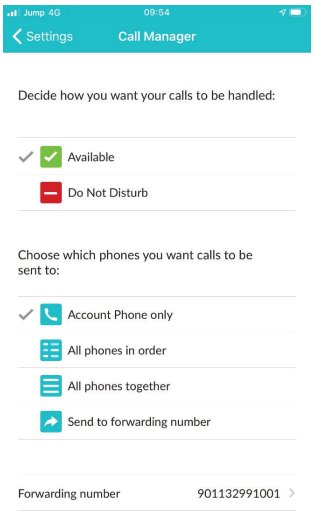
# Presence & Call Manager

## Presence

Whenever one of your contacts is signed in to their account, Pod Mobile displays their presence information on the **Messages**, **Call History**, and **Chat** tabs.

## Call Manager

You can tell Pod how to handle your incoming calls.
Tap the **Call Manager** tab and select **Available**, **Do not disturb**, or **Forward all calls**.

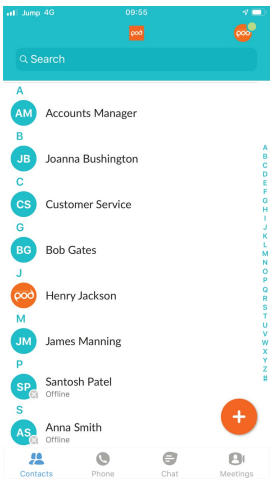



If you select **Do Not Disturb**, callers hear a recorded voice announcement saying that you are unavailable and are then connected to  your voicemail. None of your devices will ring until you turn off Do Not Disturb, so be sure to use it carefully!

Select **Forward all calls** and in the **Forwarding number** box, enter the number you want to forward all calls to.
Note that when you change your **Call Manager** settings, the change applies on all of your Pod devices.

# Contacts

Pod for Mobile assembles a contact list for you to use. Select the**Contacts** tab to view your Contacts list.




Depending on how your service is set up, the Contacts list may include:

- Contacts that you type directly into Pod for Mobile
- Contacts stored on your mobile device
- Contacts in CommPortal contacts
- Contacts in your corporate directory

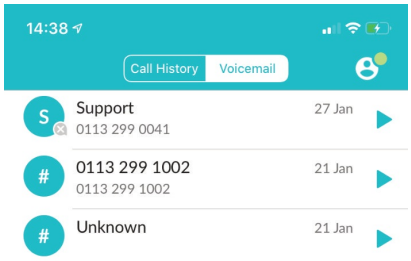
# Call History & Voicemail

## Call History

See your full call history by selecting the**Call History** tab.

## Voicemail

If you have a voice or video message, the**Messages** tab indicates the number of messages received. Select the Messages tab and tap on a message to listen to it.



# Emergency Calls

Pod lets you make calls from anywhere on the most convenient device.

If you place a 999 call from Pod, the 999 operator may not be able to identify where you are calling from.

# Pod Meeting

# Getting Started

Pod Meeting provides audio and video conferencing over the internet, including web collaboration features such as screen sharing, whiteboard annotations, and presentation capabilities.

If you have set up Pod Desktop with Pod Meeting, you can invite any of your contacts to join you in a meeting, even if they do not have Pod Desktop!

## Find Your Password

You will need your Pod CommPortal phone number and password to start using Pod for Desktop and Pod Meeting. If you don’t have this information, please contact your administrator.

## Dowload and Install the Software

First, download Pod for Desktop here: https://commportal.connectbetter.net
When prompted, save the file, then find the file in your downloads folder and open it to begin the installation process.

# Set Up a Pod Meeting

You can choose to start an instant meeting from Pod Connect for Desktop, from the CommPortal dashboard, or directly from your Outlook calendar.

Within Pod Connect for Desktop, you can send a meeting invitation:

- using the Pod Connect for Desktop File menu
- from your Contacts list or while viewing a contact’s details
- while chatting to a contact using instant messaging
- when you are in a call

When you start a meeting, you are prompted to select the contacts you want to invite to join you in the meeting. You can then start the meeting and contacts can simply click on the invitation to join your meeting.

# Schedule a Meeting

You can use Pod Meeting to schedule a one-off or recurring meeting.

Select the **Schedule A Meeting** option from Pod Desktop, from the CommPortal dashboard, or directly from your Outlook calendar to launch the **Schedule A Meeting** window. Here, you can set the date, time, and length of the meeting, and specify various other audio and video settings for the meeting.

Then click **Schedule** to open the meeting invitation and select the participants you want to invite to the meeting before sending the invite. The Pod Meeting is added to the participant’s calendar.

# Host or Participate in a Meeting

## Join a Meeting

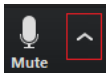
You can join a Pod Meeting by clicking on the on-screen invitation or by opening the Meeting URL in a browser.

## Explore the Meeting Window

While a meeting is in progress, you will either see the participant toolbar or the host toolbar at the bottom of the Meeting window.

## Set Up Your Audio

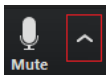
Use the **Microphone** icon to toggle your microphone on  and off.

Click on 

to change your audio options.
- Select **Join Audio** to allow Pod to use either your phone or your computer's microphone and speaker
- Select **Leave Audio** to prevent Pod from using your speaker and audio device.

Use the **Video** icon  to toggle your video on and off.

## Access the Settings Menu

Click on 

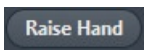
to access the **Settings** menu, where you can set up and test your microphone, speakers, and video. You can also use the **Settings** menu to specify where to save recorded meetings and to access additional application settings.

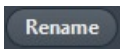
## Invite Contacts to Join You in the Meeting

Click on  and select the contacts you want to invite to join you in the meeting. The contacts you select are then sent a meeting invitation.

## View Meeting Participants

Click on  to see who has joined the meeting. You can access the following options from the Participant window.

- 

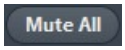
- let the meeting host know that you have something to say
- 

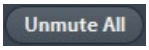
- change your display name

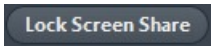
If you are the meeting host, click on **Manage Participants** to access the **Participants** window.

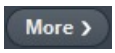
Meeting hosts can use the following additional options to manage participants:




- 

or 

or **Mute** to mute a specific individual.
- 

to prevent meeting attendees from sharing their screen.
- 

to access additional options, including:

**Mute on Entry** - mute all attendees as they join the meeting
**Play Enter/Exit Chime** when a participant joins or leaves the meeting
**Lock/Unlock Meeting** - no new attendees can join if the meeting is locked

The following icons provide additional information about each attendee.

 The participant is currently speaking.

 The participant’s microphone is on.

 The participant’s microphone is muted.

 The participant’s video camera is on.

 The participant’s video camera is off.

 The participant has raised their hand.

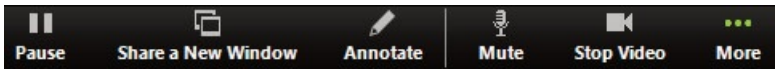
# Share Your Screen

Click on 

and choose the desktop or individual application window that you want to share.

⚠ Note: The Share Screen option may not be visible if the meeting host has selected to Lock Screen Share.

Once you are sharing your screen with meeting participants, you will see the Screen Share toolbar.




The Screen Share toolbar provides the following options:
- **Pause/Resume** screen sharing.
- **Share a New Window** - select a new window to share.
- **Annotate** your shared screen using a variety of shapes and highlight tools, including: a Mouse; Draw options (lines, shapes, and arrows); a Spotlight tool; an Eraser to remove selected annotations; and Undo, Redo and Clear annotation options. Note: The Annotate option may not be visible if the meeting host has selected to Disable Attendee Annotation.
- **Mute** - toggle your microphone on and off.
- **Stop/Start Video** - toggle your video sharing on and off.
- **More** - access Chat, Record, Settings, and Audio Conference options.

Click 

to exit screen sharing.

# Chat & Record

## Send a Message to Meeting Attendees

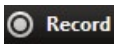
Click on 

to open a Chat window and send a message to another meeting attendee.

Click on 

to save the conversation to your local computer.

## Record Your Meeting

Click on 

to start recording the meeting.

Click 

to end recording.

When the meeting ends, you will see a pop-up saying that the meeting recording is being saved and converted to mp4 format.
The directory containing the saved recording then automatically opens showing the recorded file, and the meeting will also appear in your list of recorded meetings within the Pod Meeting application.

You can specify the directory to save recorded meetings to using the**Settings** menu.

> ⚠ Note: The **Record** option may not be visible if the meeting host has disabled recording for the meeting.

# Additional Meeting Window Options



extends the meeting display to a full-screen display.



exits the full-screen display.



displays the video for all meeting participants.



displays the video for the current speaker.

# Leave the Meeting

Click on 

to leave the meeting.

If you are the meeting host, click on 

- this will end the meeting for all participants.