

Hosted Voice Service User Guide

May 2017



Contents

1	Introduction.....	1-1
2	Making calls.....	2-1
2.1	Internally.....	2-1
2.2	Externally.....	2-1
2.3	Emergency calls.....	2-1
2.4	Speaker phone.....	2-1
2.5	Ending calls.....	2-1
3	Answering calls.....	3-1
3.1	Using the handset.....	3-1
3.2	Using the speaker.....	3-1
4	Advanced call handling.....	4-1
4.1	Putting a call on hold.....	4-1
4.2	Call Waiting.....	4-1
4.3	Transferring a call.....	4-1
4.3.1	Supervised Transfer.....	4-1
4.3.2	Blind Transfer.....	4-2
4.3.3	Transfer Direct to Voicemail.....	4-2
4.4	Three Way Conferencing.....	4-3
4.5	Parking a call.....	4-3
4.6	Retrieving a parked call.....	4-4
4.7	Do Not Disturb.....	4-4
5	Voicemail.....	5-1
5.1	Accessing voicemail.....	5-1
5.2	Using the voicemail system.....	5-1
6	Other phone features.....	6-1
6.1	Speed dials.....	6-1
6.2	Monitoring other lines.....	6-1
6.3	Paging.....	6-2
6.3.1	Paging Groups.....	6-2
6.3.2	Overhead Paging.....	6-2
6.3.3	Polycom Phone Paging.....	6-2
6.3.4	Cisco Phone Paging.....	6-3
6.4	Account codes.....	6-3

6.5	Headset.....	6-4
6.6	Further information.....	6-4
7	Introducing CommPortal.....	7-1
7.1	Accessing.....	7-1
7.2	Logging in.....	7-1
7.3	Using CommPortal.....	7-2
7.4	Getting help.....	7-3
7.5	Refreshing a page.....	7-3
7.6	Logging out.....	7-3
8	CommPortal Dashboard	8-1
8.1	Messages.....	8-1
8.2	Missed calls.....	8-2
8.2.1	Call back	8-2
8.3	Contacts.....	8-3
8.3.1	Calling a contact	8-4
8.4	Settings.....	8-4
9	Messages & Calls.....	9-1
9.1	Messages.....	9-2
9.1.1	Listen to a message	9-3
9.1.2	Deleting a message	9-3
9.1.3	Marking a message as heard	9-3
9.1.4	Marking a message as new	9-4
9.1.5	Call back	9-5
9.1.6	Add caller to contacts.....	9-5
9.2	Faxes	9-6
9.3	Missed.....	9-6
9.3.1	Add caller to contacts.....	9-7
9.4	Dialed.....	9-7
9.4.1	Add dialed number to contacts	9-7
9.5	Received.....	9-8
9.5.1	Add number to contacts	9-8
10	Contacts	10-1
10.1	Contact List.....	10-2
10.1.1	Searching.....	10-3
10.1.2	Add a new contact.....	10-4
10.1.3	Editing a contact	10-8
10.1.4	Deleting a contact	10-8
10.1.5	Calling a contact	10-8

10.1.6	Groups.....	10-9
10.2	Speed Dials	10-12
10.2.1	Adding a speed dial.....	10-13
10.2.2	Deleting a speed dial.....	10-13
10.3	Extensions.....	10-14
10.4	Short codes.....	10-16
11	Easy Call Manager (ECM).....	11-1
11.1	Available profile	11-1
11.1.1	Normal callers.....	11-2
11.1.2	Anonymous callers.....	11-3
11.1.3	VIP callers.....	11-4
11.1.4	Unwanted callers.....	11-6
11.1.5	Additional options.....	11-7
11.2	Do Not Disturb profile	11-8
11.3	Forward All Calls profile	11-9
12	Incoming Call Manager (ICM).....	12-1
12.1	Summary	12-1
12.2	Rules based routing.....	12-2
12.3	Schedule based routing	12-7
12.4	Special days (holidays)	12-8
13	Groups.....	13-1
13.1	Multi Line Hunt Groups.....	13-2
13.1.1	Viewing Multi Line Hunt Groups.....	13-2
13.1.2	Using Multi Line Hunt Groups	13-3
13.1.3	Using the Agent Status screen	13-3
13.2	Call Pickup Groups	13-6
13.2.1	Viewing Call Pickup Groups	13-6
13.2.2	Using Call Pickup	13-7
14	Settings.....	14-1
14.1	Account.....	14-2
14.2	Calls	14-4
14.3	Messages	14-6
14.4	Account Codes	14-9
14.4.1	Account code options.....	14-10
14.4.2	Business account codes.....	14-11
14.4.3	Personal account codes	14-12
14.4.4	Unblocking account codes	14-14
14.5	Notifications.....	14-15

14.6	Reminders	14-22
14.6.1	Adding reminders.....	14-22
14.6.2	Deleting reminders.....	14-24
15	Click To Dial.....	15-1
15.1	Calling from your regular phone.....	15-2
16	Configuring your phone's keys	16-1
16.1	Using the Phone Configurator's graphical view	16-1
A	Access codes	A-1
B	Phone Feature Exceptions Matrix between Cisco and Polycom	B-1

1 Introduction

Welcome to your new phone!

This document describes the features of your phone, including the web management tool, CommPortal.

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

- Chapters 2 to 6 outline the most common tasks that you will carry out when using your new desk phone, including
 - making internal and external calls
 - answering calls using either the handset or speakerphone
 - accessing your messages through the voicemail system
 - moderating and taking part in conference calls

These chapters also describe some more advanced call handling features, such as:

- putting calls on hold
- transferring calls
- conferencing a third person into a two-way call
- parking calls

You should familiarize yourself with these chapters first so that you can begin using your phone as soon as possible.

- Chapters 7 to 16 describe the more advanced functions and features of your phone system, including using CommPortal to manage your messages, missed calls, contacts and phone settings.
- Appendix A contains a quick-reference guide to all of the access codes that you will need when using your new phone.
- Appendix B can be used to record information that you will need frequently when using your phone system, such as phone numbers, codes and conferencing information.

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

2 Making calls

2.1 Internally

To call another person in your business, lift the handset and dial the other person's extension. This is typically a 3 or 4 digit number, and may begin with # however, support for a mix of 3 & 4 digit extensions per Business Group is not supported.

Note that depending on your phone type and configuration, the call may not complete automatically once you have finished dialing and you may need to hit the **OK** or **Confirm** key or the **Dial** key (Cisco or Polycom phones) once you have dialed the number.

2.2 Externally

To call a number outside of your business, lift the handset and dial the phone number. Depending on your phone system you may need to dial a code at the beginning of the phone number to indicate you are making an external call.

Note that depending on your phone type and configuration, the call may not complete automatically once you have finished dialing and you may need to hit the **OK** or **Confirm** key or the **Dial** key (Polycom phones) once you have dialed the number.

2.3 Emergency calls

In an emergency lift the handset and dial 911. If you need to dial a code when calling an external number, you will also need to dial that code before calling 911.

Note that depending on your phone type and configuration the call may not complete automatically once you have finished dialing and you may need to hit the **OK** or **Confirm** key or the **Dial** key (Cisco or Polycom phones) once you have dialed the number.

2.4 Speaker phone

To make a call using your speaker phone, either press the Speaker key or leave the handset on-hook and dial the number of the person you want to call, followed by the **OK** or **Confirm** key (or the **Dial** key (Cisco or Polycom phones).

2.5 Ending calls

To end a call replace the handset or press the **End Call** key (Cisco or Polycom phones).

3 Answering calls

3.1 Using the handset

To answer an incoming call, lift your handset and you will be connected to the caller.

3.2 Using the speaker

To answer a call using the speakerphone, do not lift the handset and instead press the **Speaker** key. (For Polycom phones, you can press either the **Speaker** or **Answer** key.)

4 Advanced call handling

4.1 Putting a call on hold

You can put a call on hold by pressing the **Hold** key. You may now replace the handset without cutting the caller off. You can also now make another call while the first call is on hold.

To retrieve call on hold press the line key that is blinking the held call or press the “Resume” lower Softkey. If you’ve made another call since you put the first call on hold, you’ll need to either end that call or put it on hold before you can retrieve the first one.

4.2 Call Waiting

If a second call comes in when you are already on the phone, you will hear a tone and the phone screen will display the details of the second caller.

To answer this second call, press the **Answer** key or press the line key which is flashing. Answering the second call will automatically put the first call on hold. You can toggle between the calls by placing the current one on hold and retrieving the other call. You can also toggle between calls on separate line keys by pressing each line key appearance. By doing so, each call you toggle between will automatically be placed on hold.

4.3 Transferring a call

4.3.1 Supervised Transfer

Polycom Phones

1. While on the line with Caller press the “Trnsfer” Softkey
2. Dial the extension or number of the person you wish to transfer the call to
3. Wait for the person to answer first
4. When person you are transferring call to answers, announce call
5. Press the “Transfer” Softkey or “hang up” call from your phone and call is transferred

Cisco Phones

1. While on the line with Caller press the “**Transfer**” or “xfer” Softkey
2. Dial the extension or number of the person you wish to transfer the call to
3. Press the “Dial” Softkey to initiate call to transfer location
4. Wait for the person to answer first
5. When person you are transferring call to answers, announce call
6. Press the “**Transfer**” or “xfer” Softkey (Do Not Hang up until you’ve pressed “Transfer” Softkey) and call is Transferred

4.3.2 Blind Transfer

Polycom Phones

1. While on the line with Caller press the “Trnsfer” Softkey
2. Next Press the “Blind” Softkey that will now appear
3. Dial extension or number you wish to transfer to
4. Press the “Send” Softkey to complete the “Blind Transfer”

Cisco Phones

1. While on the line with Caller press the “**Transfer**” or “xfer” Softkey
2. Dial the extension or number of the person you wish to transfer the call to
3. Press “Dial” soft key to initiate call to transfer location
4. Press the “**Transfer**” or “xfer” Softkey (Do Not Hang up until you’ve pressed “Transfer” Softkey) and call is Transferred Blind

4.3.3 Transfer Direct to Voicemail

Polycom Phones

1. While on the line with Caller press the “Trnsfer” Softkey
2. Next Press the “Blind” Softkey that will now appear
3. Dial *99 plus the extension number you wish to transfer to voicemail
4. Press the “Send” Softkey to complete the “Blind Transfer”

Cisco Phones

1. While on the line with Caller press the “Transfer” or “xfer” Softkey
2. Dial *99 plus the extension number you wish to transfer to voicemail
3. Press “Dial” Softkey to initiate call to transfer location
4. Press the “Transfer” or “xfer” Softkey (Do Not Hang up until you’ve pressed “Transfer” Softkey) and call is Transferred Blind

4.4 Three Way Conferencing

To conference a third person into a regular two-way phone call, follow these steps.

1. When in a regular call, press the **Conference** key
2. Dial the person you want to join your call.
3. Once this person has answered press the **Conference** key again to set up the three way call.

4.5 Parking a call

Parking a call places the call on hold in a "park orbit" so that the call can be retrieved from another phone. Depending on your phone type, there are two ways of parking a call.

1. If you have keys on your phone for parking calls, when in a call press the key of the park orbit where you want the call parked. The call will now be parked and you may now replace the handset.
2. If your phone doesn't have dedicated call park keys, follow these steps:
 - Initiate call transfer by pressing the **Transfer** key or the **Xfer** key.
 - Dial the Call Park access code ***13**.
 - Listen to the park orbit number where the call will be parked.
 - Complete the call transfer by pressing **Transfer** or **Xfer** again.

If you have keys on your phone for parking calls these keys will indicate via a light or icon when a call is parked against that orbit.

4.6 Retrieving a parked call

Depending on your phone type, there are two ways of retrieving a parked call.

1. If you have keys on your phone for parked calls, pick up the handset and press the key of the park orbit where the call is parked.
2. If you don't have dedicated call park keys lift the handset and dial the Call Retrieve access code ***14** followed by the park orbit number.
 - For example, to retrieve a call parked on orbit 1, you should dial ***141**.

4.7 Do Not Disturb

If you don't want any calls to ring your phone, you can enable Do Not Disturb.

If you have a key marked **DND** then press this to toggle Do Not Disturb on and off.

5 Voicemail

5.1 Accessing voicemail

When you have one or more unheard voice messages waiting, your phone will display a flashing light.

To listen to your messages log in, either by dialing the voicemail access code *98, or press the Messages or Voicemail key if your phone has one.

The first time you access you voicemail box you will be asked to set up your mailbox, and record your name and a greeting to be played by callers.

5.2 Using the voicemail system

The voicemail system is menu driven, so listen to the voice prompts and then press the keys on your phone to select which option you would like.

Once you become familiar with the system there is no need to wait until the voice prompts have played before pressing a key – you can interrupt the announcements to speed up your experience.

For your convenience, the most commonly used mailbox commands are as follows.

Table 1: Mailbox Commands

To listen to your voice messages from the main menu:	Press 1
To save a message once you've listened to it:	Press 2
To delete a message once you've listened to it:	Press 3
To send a message:	Press 2
To work with your greetings:	Press 3
To change your mailbox settings from the main menu:	Press 4
To cancel the current operation:	Press *
To go back to the previous menu:	Press *
To finish entering digits, or recording an announcement:	Press #

6 Other phone features

6.1 Speed dials

Your phone system supports three different sorts of speed dials.

1. Depending on your phone model, keys on your phone can be configured to automatically call certain destinations. To configure these keys for speed dials, see Section 10.
2. Another sort of speed dial is where you dial a short number (1 or 2 digits), which is configured to call a regular extension or phone number. To configure these speed dials, see Section 10.2.
3. Your phone system also supports Short Codes. These are short (usually 3, 4 or 5 digit) numbers which are speed dials that can be used and are the same on any phone in your business. They are set up by your administrator and you can view them in CommPortal. See Section 10.4 for how to do this.

6.2 Monitoring other lines

Some models of phones let you monitor the status of other extensions in your business. A key and a lamp on your phone will be associated with that other extension.

- If there is no call in progress on that extension, the lamp will not be lit.
- If a call is ringing on that extension, the lamp will blink quickly.
- If a call is in progress on that extension, the lamp will be lit solidly.

If you want to answer a call that is ringing on the extension you are monitoring, pick up your handset and press the key for that extension. You will be connected to the caller.

You can also use these keys as speed dials for the other extension. To call the other extension when there is no call in progress on it, pick up your handset and press the key for that extension.

6.3 Paging

6.3.1 Paging Groups

What Paging is supported?

Paging through the phone

Both Cisco and Polycom Phones support limited paging to select groups that phones subscribe depending on how the Administrator of the HVS location wishes to have the groups set up. Pages initiated by these users on the phones only go to the other phones in the same subscribed groups.

NOTE: Users cannot page across the WAN to other locations as the Paging groups rely on a non-routed Multicast IP network domain local only to the LAN at the customers location and HVS Build.

6.3.2 Overhead Paging

Overhead paging is only supported when connected to a Cisco SPA112 that has a Basic Subscriber seat assigned to it. Then We recommend connecting that Analog Station port to a paging amplifier or conversion device such as a Viking RAD-1A or a Viking PA-2A. These devices are not sold by **Allstream** but are a recommendation of what to go look for in order to integrate with a customers' existing overhead paging amplifier system.

NOTE: Users cannot page Overhead paging and Phone paging at the same time since the technology used to deploy the two are disparate and not unified.

6.3.3 Polycom Phone Paging

How users page

Simple set up description

The Business Group Administrator will follow instructions and configure each of their phones in their business group using the SIP Provisioning Server (SIP PS) found in the Business Group Administrator Guide. Once set up, the phones will be able to either make or receive pages in each of their respectively assigned paging groups.

1. Go to the phone and locate the "Paging" Softkey and press it. On the SoundpointIP 335, the LCD real estate is limited so more than likely you will see a "More" Softkey which will allow the user to page over to where they can see the "Paging" soft-key.
2. Once the user has pressed the "Paging" soft-key on the LCD a list of the groups the handset is able to transmit to will appear. The user must then select the group they wish to announce on. On the SoundpointIP 335 users must use the directional pad to scroll up or down to scroll through the groups they wish to transmit on.
3. Once the user has selected the group they wish to transmit on, the "Page" soft-key will appear on the lower left side of the LCD display. Once that appears, press it to open the transmit channel to proceed with the "Page". At this time user will hear an audible beep to indicate the channel is open and they can begin to speak into either the hands free microphone if initiated while "on-hook" or the handset if initiated while "off-hook".
4. Once completed with the announcement the user can either hang up the call or press the "Exit" soft-key and the paging will end.

6.3.4 Cisco Phone Paging

How users page

Simple set up description

The Business Group Administrator will follow instructions and configure each of their phones in their business group using the SIP Provisioning Server (SIP PS) found in the Business Group Administrator Guide. Once set up, the phones will be able to either make or receive pages in each of their respectively assigned paging groups.

1. Users will pick up their handset or go “off-hook” in hands-free mode and select a “line” key. Once they hear the dial tone they’ll enter in the 2-3 digit code that has been configured by the BG Admin for the paging group they wish to address.
2. Once the code has been entered the user will press the “Dial” Soft key to proceed with the “Page” call.
3. Once the “Page” call has been initiated the user will hear an audible tone to know that the channel is open for them to announce the “Page”. The user can now speak and announce their page.
4. Once completed with the announcement the user can either hang up the call or press the “End Call” Soft key and the paging will end.

6.4 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. For more on account codes see Section 14.4.

6.5 Headset

Most of the models of phones supported by your phone system allow you to connect a headset. This allows you to make and take calls while keeping your hands free for other tasks.

To connect a headset to your phone, turn the phone upside down and connect the headset into the socket marked with the headset icon. To make or answer a call using your headset, press the headset key on your phone.

6.6 Further information

If you want a more detailed description of the operation of your model of phone, please refer to the manufacturer's instructions and refer to Appendix B for Feature exceptions. Phone Vendor information can be found on their websites located here:

<http://www.polycom.com/>

http://www.cisco.com/cisco/web/solutions/small_business/products/voice_conferencing/SPA_300/index.html

http://www.cisco.com/cisco/web/solutions/small_business/products/voice_conferencing/SPA_500/index.html

7 Introducing CommPortal

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

7.1 Accessing

To access CommPortal, go to the resource center at <http://www.integratelecom.com/support/voicesupport/pages/hosted-voice-resources.aspx>, and click on the “User CommPortal Login” link.

CommPortal is supported on Windows 2000, Windows XP, Windows 2003 and Windows Vista, using the following browser versions:

- Internet Explorer 6
- Internet Explorer 7
- Mozilla Firefox 2.0
- Google Chrome

JavaScript must be enabled on your browser.

7.2 Logging in

The following shows a sample CommPortal login page.

Figure 1: CommPortal login page

Please log in below.

Number:

Password:

Remember me on this computer.

Login

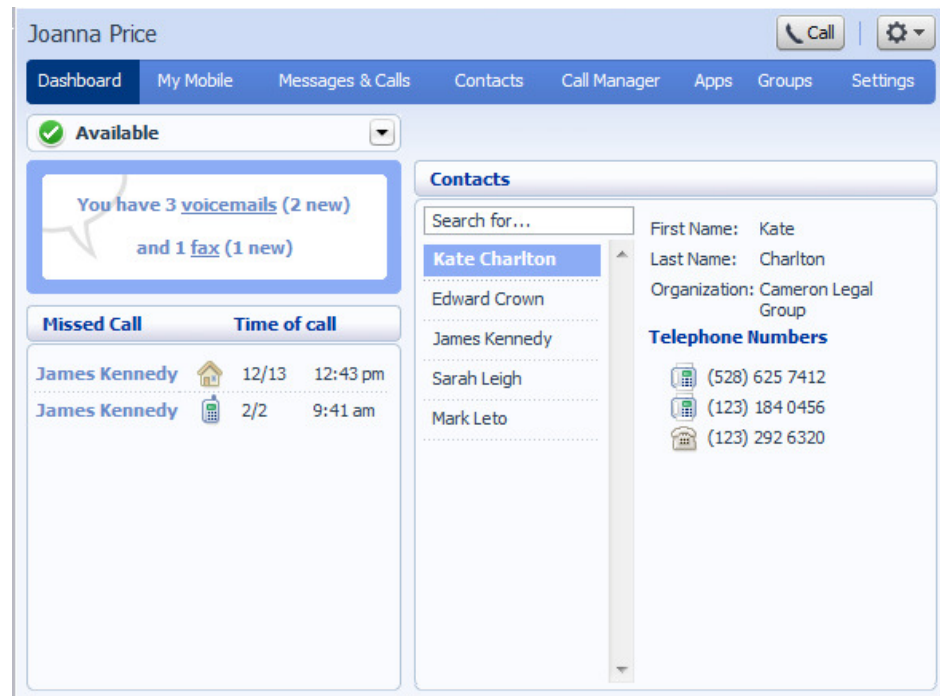
If you have forgotten your password, please contact customer support.

To log into CommPortal enter your phone number without dashes and your password, and click on *Login*.

7.3 Using CommPortal

Once you have logged in, you will see the CommPortal Dashboard. This gives you a quick at-a-glance summary of your messages, missed calls, contacts and phone settings.

Figure 2: CommPortal Dashboard




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

- **Dashboard.** This is the at-a-glance summary you see when you first log into CommPortal.
- **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.
- **Call Manager.** The Call Manager page lets you configure the services on your phone line, like Call Forwarding and Selective Call Rejection.
- **Reminders.** This page allows you to set up reminder calls. This is a submenu under Settings.
- **Groups.** Here you can view any groups your line is part of in your business, such as hunt groups. You can also login and logout of groups here.

- **Settings.** The Settings page gives you access to numerous other options, such as changing your passwords and PINs, and configuring the keys on your phone.

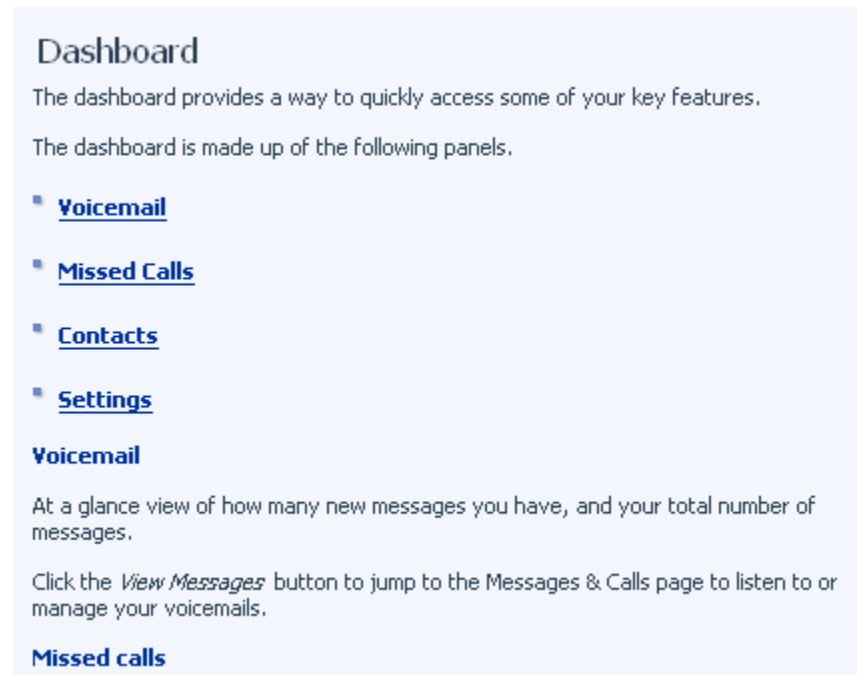
Using the functions in each of these pages is described in more detail in the rest of this document.

7.4 Getting help


If you need some assistance with using CommPortal, you can click on the More Options icon () and select Help.

This will cause another browser window to pop-up with help for the page you are currently using:


Figure 3: CommPortal Help



7.5 Refreshing a page

If you want to refresh a page, for example to check whether you've received any new voicemails since you last looked, you can click on the More Options icon () and then select Refresh.

7.6 Logging out

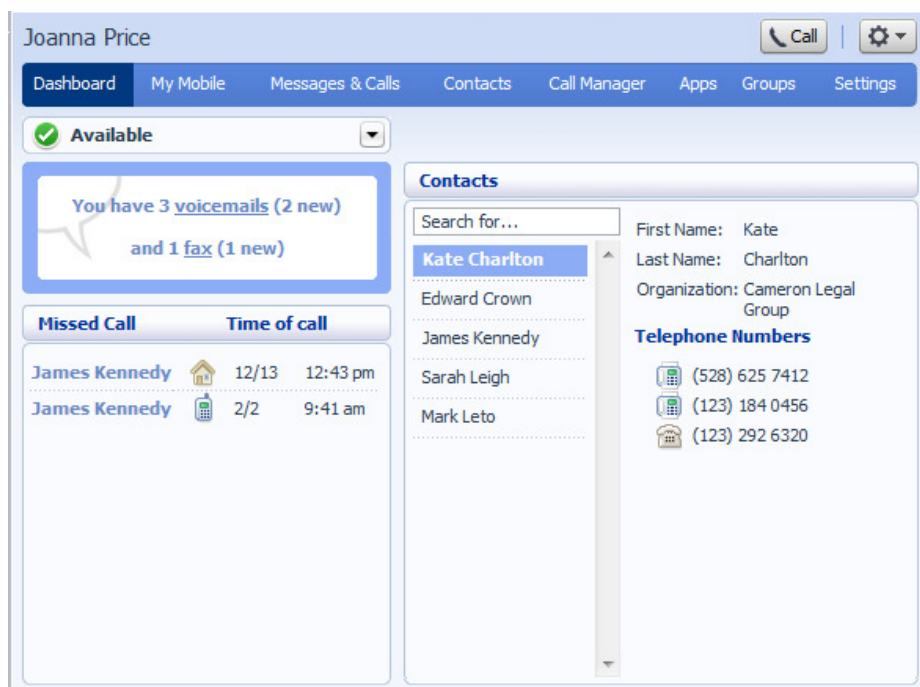
If you don't use CommPortal for 30 minutes you will be automatically logged out. However, if you wish to manually log out, for example because you've been accessing CommPortal using a shared computer, you can do this by clicking the More Options icon () and then selecting Logout.

8 CommPortal Dashboard

The CommPortal Dashboard is shown when you log into CommPortal and gives you an at-a-glance summary of your phone line. In this section we'll examine the Dashboard in more detail.

Here is an example Dashboard:

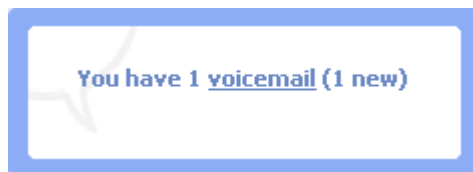
Figure 4: CommPortal Dashboard



8.1 Messages

In the top left hand corner you can see if you have any new voice messages:

Figure 5: CommPortal Dashboard New Voice Message Count

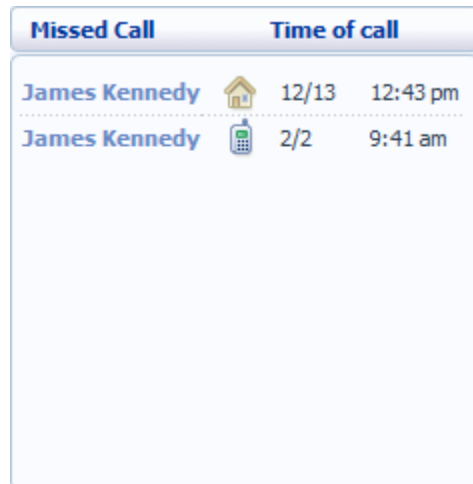




To view and listen to new messages, click on the *voicemail* link. This will take you to the Messages & Calls page, which is described in Section 9.

8.2 Missed calls

This section shows you the most recent calls which you have missed:

Figure 6: CommPortal Dashboard Missed Calls display



Missed Call	Time of call
James Kennedy 	12/13 12:43 pm
James Kennedy 	2/2 9:41 am


To see other types of calls, go the Messages & Calls page, described in Section 9.

8.2.1 Call back

To call back a number whose call you missed using Click To Dial, follow these steps:

1. Click on the number of the caller.
2. Select one of the *Dial* options available on the menu that appears to connect your call.

Figure 7: Call back pop up



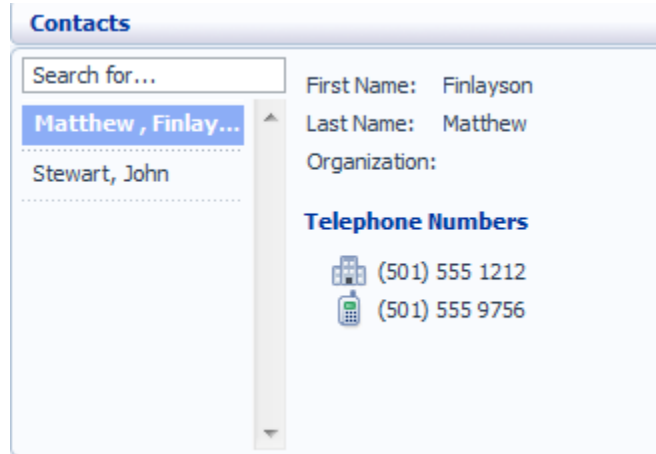
Missed Call	Time of call
Unknown	11/2 12:43 pm
(208) 362 2087	9/26 12:43 pm
(208) 362 2087	9/24 4:19 pm

Dial (208) 362 2087 from 6 (534) 789 6543
Dial (208) 362 2087 from other number...

8.3 Contacts

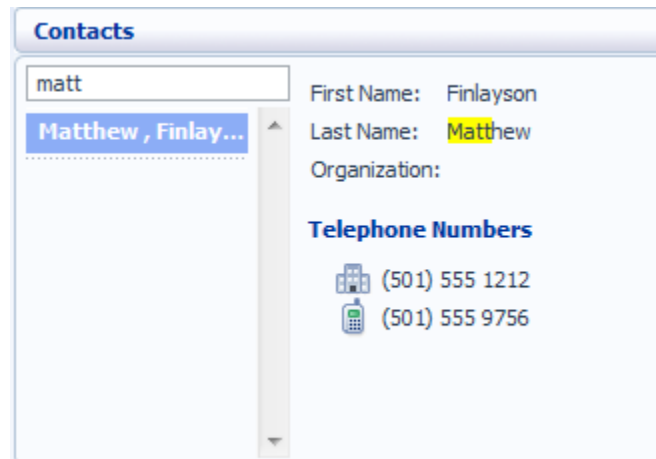
The Contacts section displays all of your contacts and allows you to search them:

Figure 8: CommPortal Dashboard Contacts display



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 in yellow:

Figure 9: Search Contacts



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

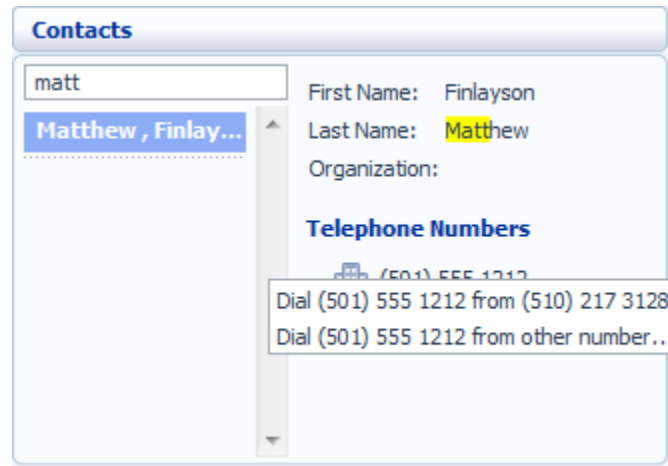
To add, modify or delete contacts, see Section 10.

8.3.1 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 one of the *Dial* options available on the menu that appears to connect your call.

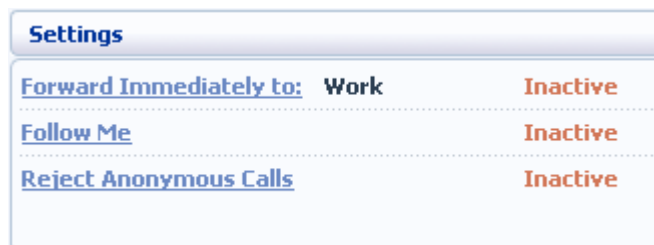
Figure 10: Click To Dial pop up



8.4 Settings

Your main settings will be shown at the bottom right of CommPortal. This shows you the current status of your main phone line settings:

Figure 11: CommPortal Dashboard Settings display



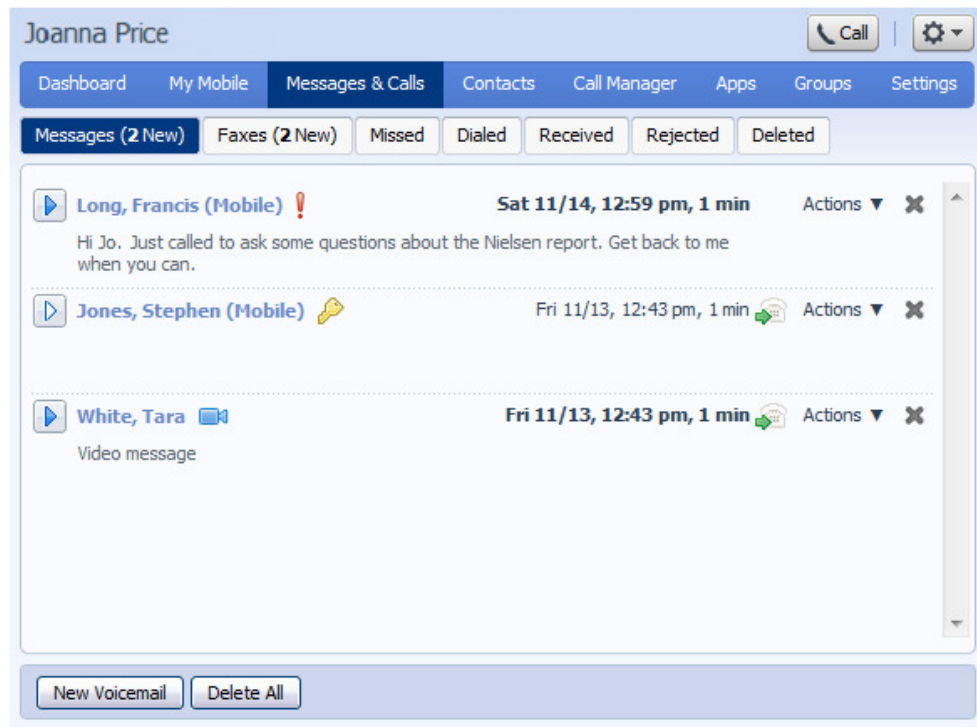
In the example above Call Forwarding Immediate, the Follow Me service and Anonymous Call Rejection are all inactive (disabled).

To change one of these settings you can either click on the link for that setting, or select the Call Manager page, described in Section 11.

9 Messages & Calls

The Messages & Calls page has a number of sections which you can select by clicking on the tab:

Figure 12: CommPortal Messages & Calls page



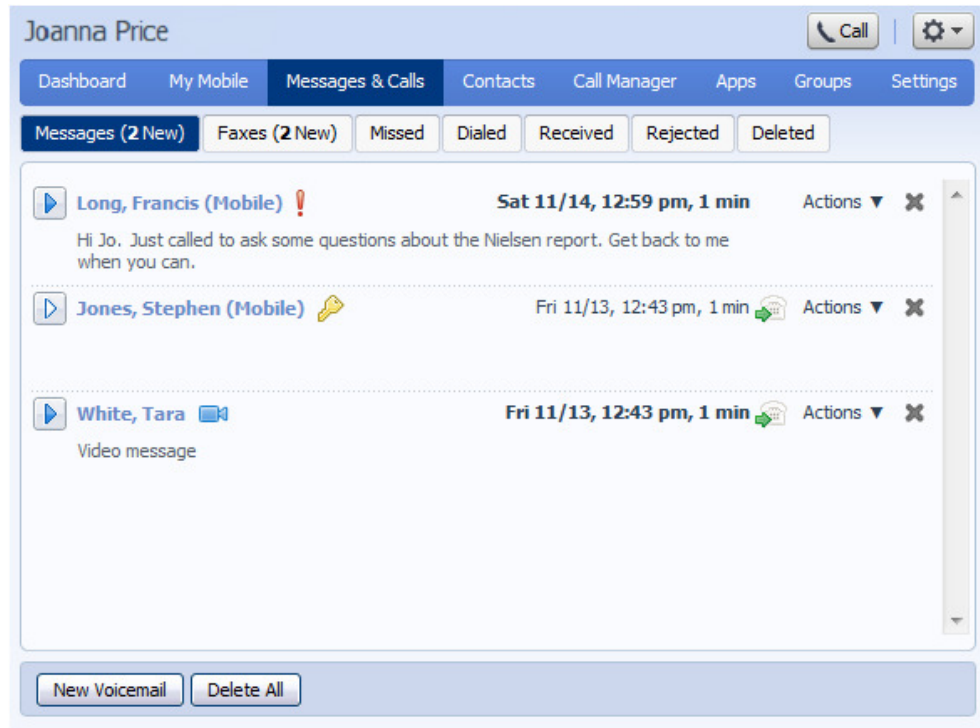
- Messages - shows you all of your new and stored voice messages.
- Faxes - shows you any new and stored fax messages.
- Missed - displays the recent calls you have received and not answered.
- Dialed - displays the recent calls you have made, including those made by Click To Dial as described in Section 15.
- Received - shows the recent calls you have answered.

Each of these sections is described in more detail below.

9.1 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:

Figure 13: Messages & Calls – Messages tab

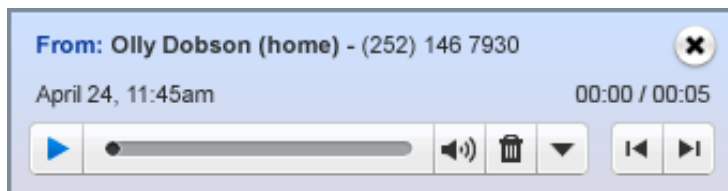


9.1.1 Listen to a message

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.

Figure 14: 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.

9.1.2 Deleting a message

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

9.1.3 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:


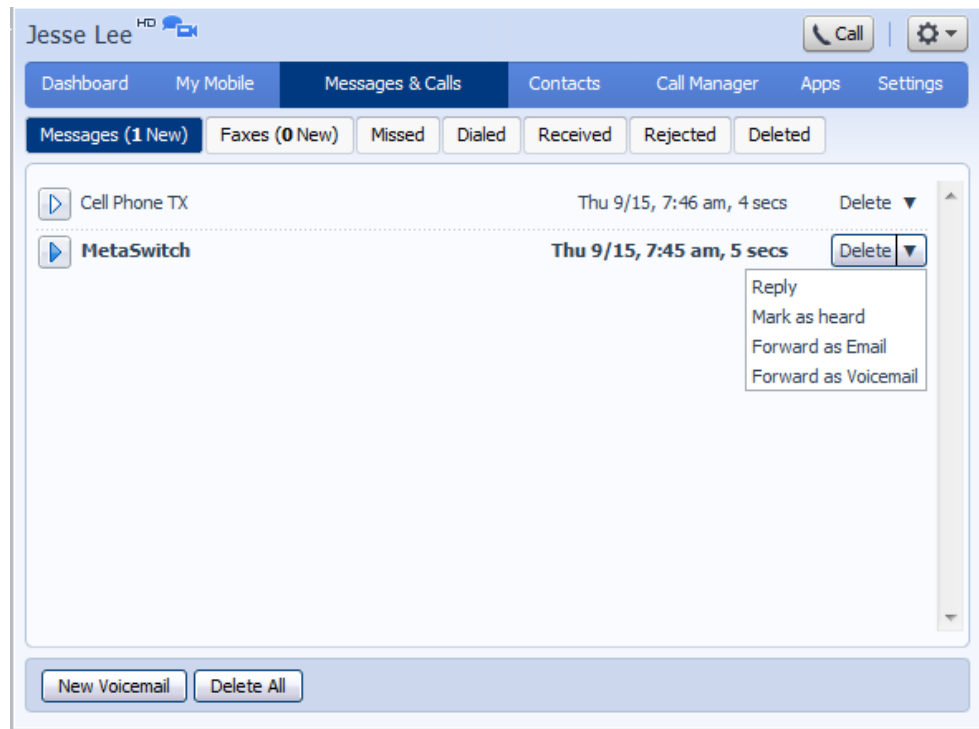

- Click on the  icon to the right of the message and select Mark as heard from the dropdown.

Figure 15: Message options drop down menu



9.1.4 Marking a message as new

To mark a message as new, follow these steps:

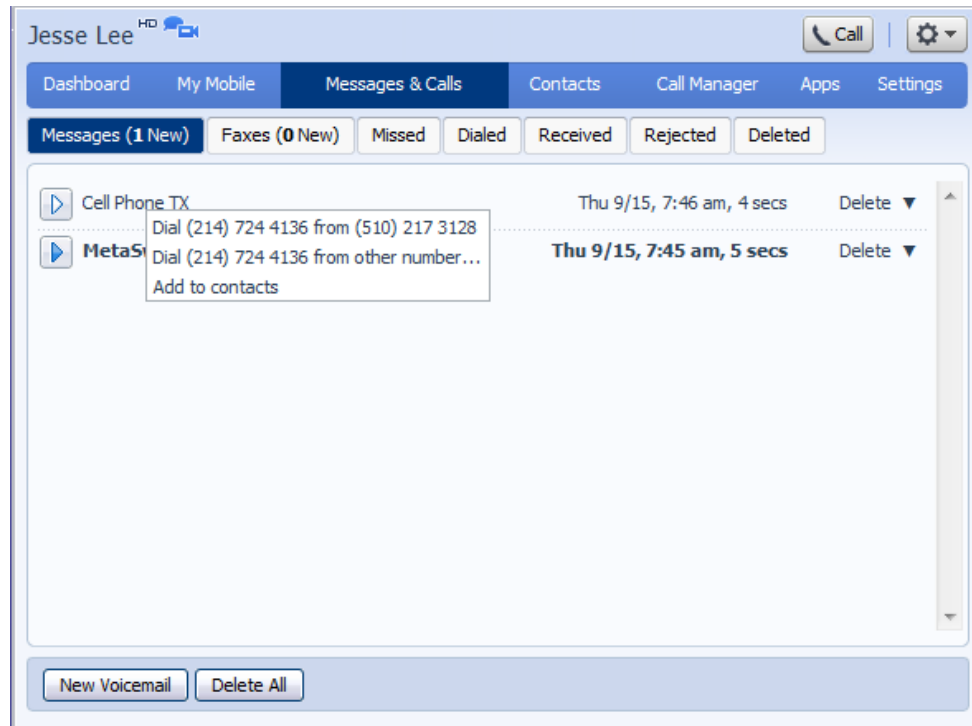
1. Click on the  icon to the right of the message, as shown in Figure 15.
2. Select Mark as new from the dropdown.

9.1.5 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 *Dial* option.

Figure 16: Call back message sender



9.1.6 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 Section 10 for more information on using the Contacts page.

9.2 Faxes

The Faxes tab lets you view your read and unread fax messages in the same way as the Messages tab does for voice messages.

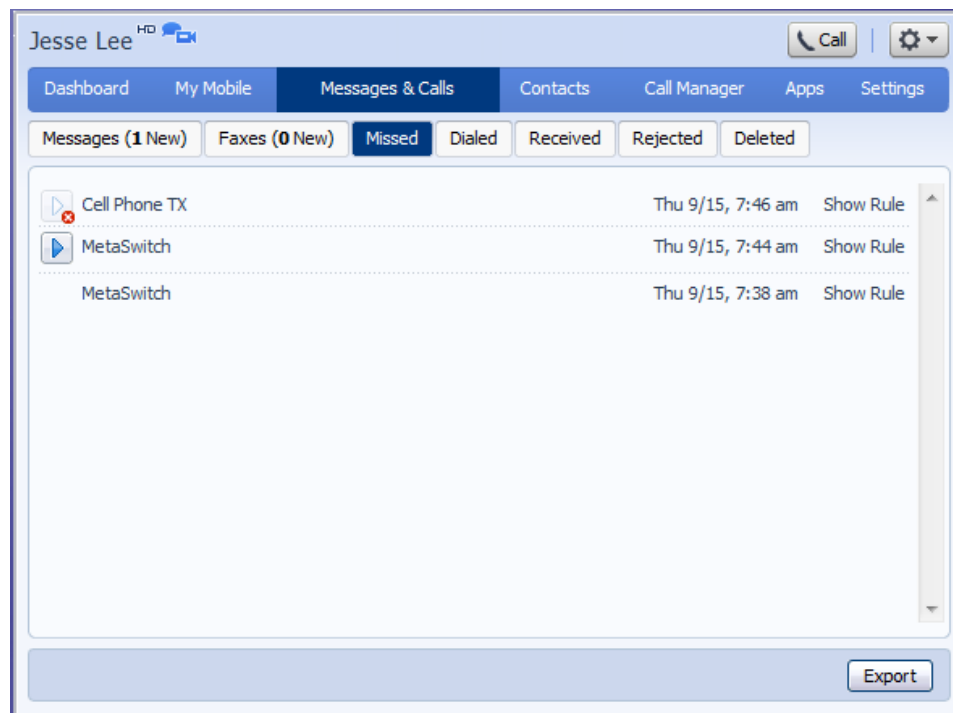
If you have Unified Fax Messaging, make sure those sending you a fax are aware that they must listen to your Voicemail Greeting in its entirety then press **7** at the end of your greeting to send the fax.

Note: If you would like faxes to go directly into your mailbox a purchase of an additional FAX DID is necessary to have faxes be directly deposited into your mailbox without calls alerting your phone.

9.3 Missed

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

Figure 17: 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.

9.3.1 Add caller to contacts

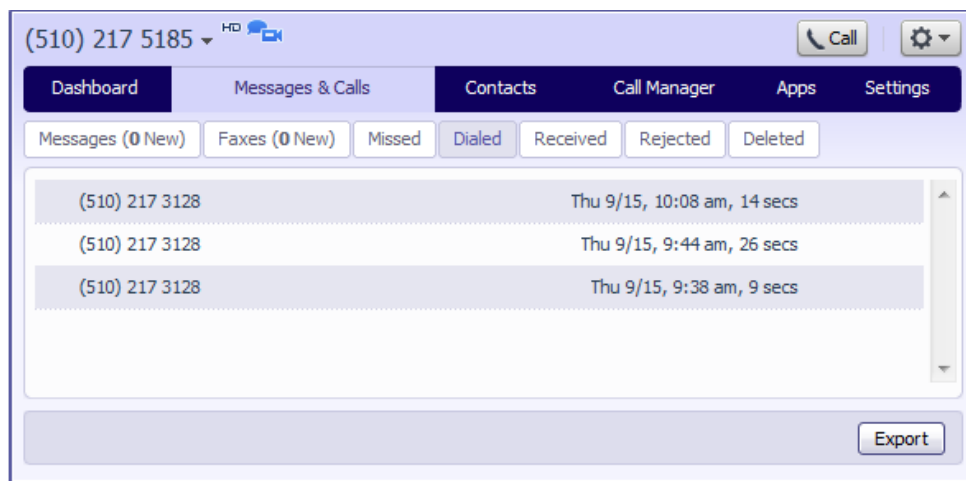
To add the number of someone who called you to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 10 for more information on this.

9.4 Dialed

This page shows you all of the recent calls you have made, including those which you made using Click To Dial (described in Section 15):

Figure 18: Messages & Calls – Dialed tab



9.4.1 Add dialed number to contacts

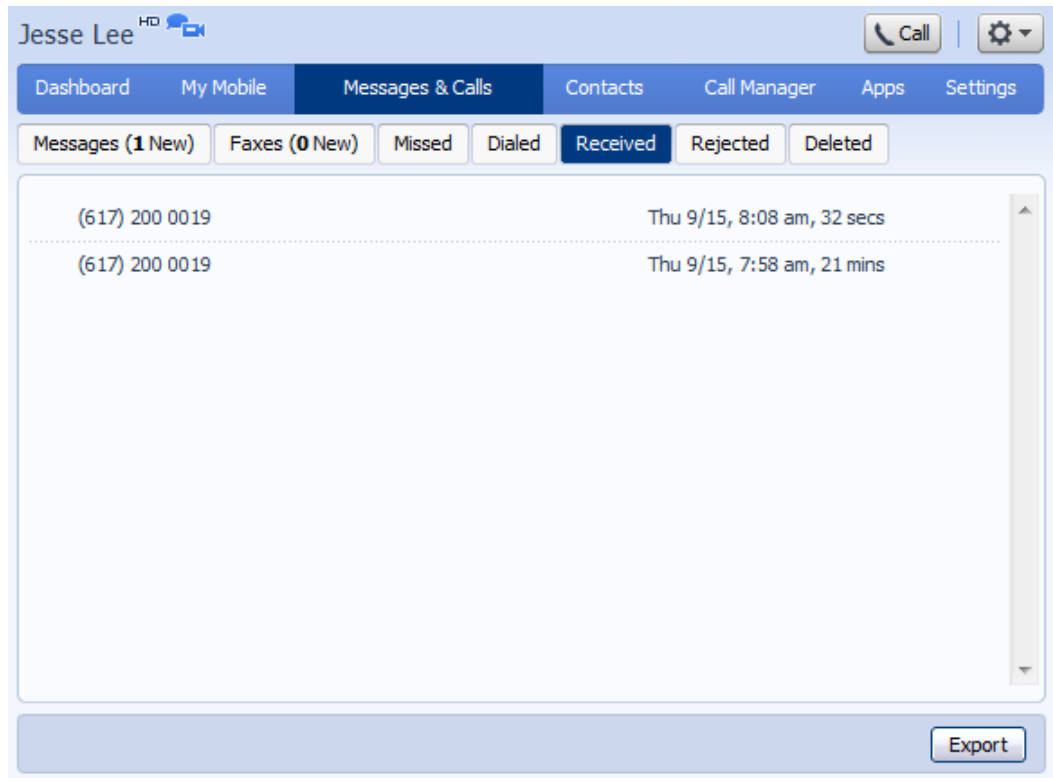
To add the number of someone you called to you to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 10 for more information on using the Contacts page.

9.5 Received

This page shows you all of the recent calls you have answered:

Figure 19: Messages & Calls – Received tab



9.5.1 Add number to contacts

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

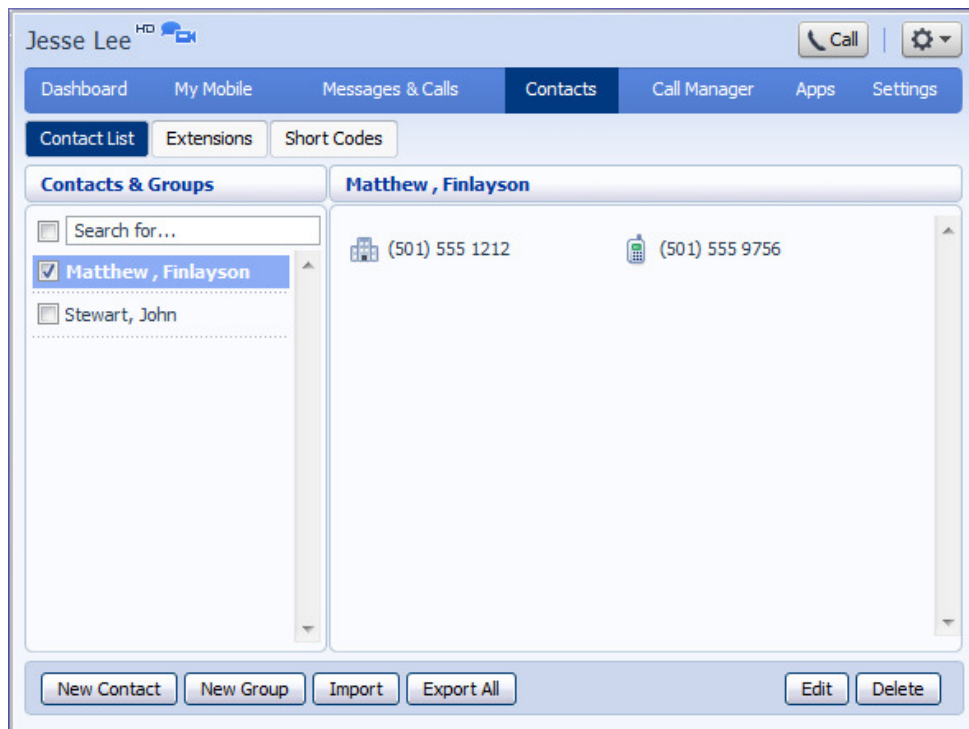
1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.

This will now take you to the Contacts page. Enter the details for your new contact and click on Save. See Section 10 for more information on using the Contacts page.

10 Contacts

The Contacts page consists of a number of different sections, which you can select by clicking on the tabs:

Figure 20: CommPortal Contacts page



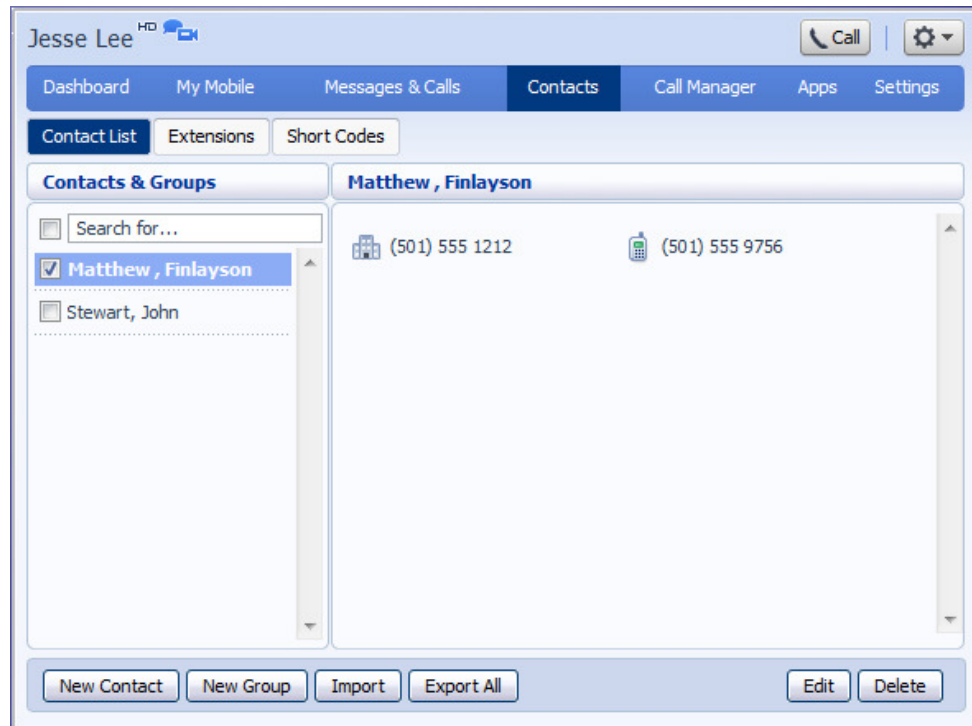
- Contact List allows you to manage your personal contact list.
- Speed Dials is where you configure your numeric speed dials.
- Extensions show you the extensions within your business.
- Short Codes shows you your business's numeric speed dials.

Each of these sections is described in more detail below.

10.1 Contact List

The Contact List shows you all of your contacts:

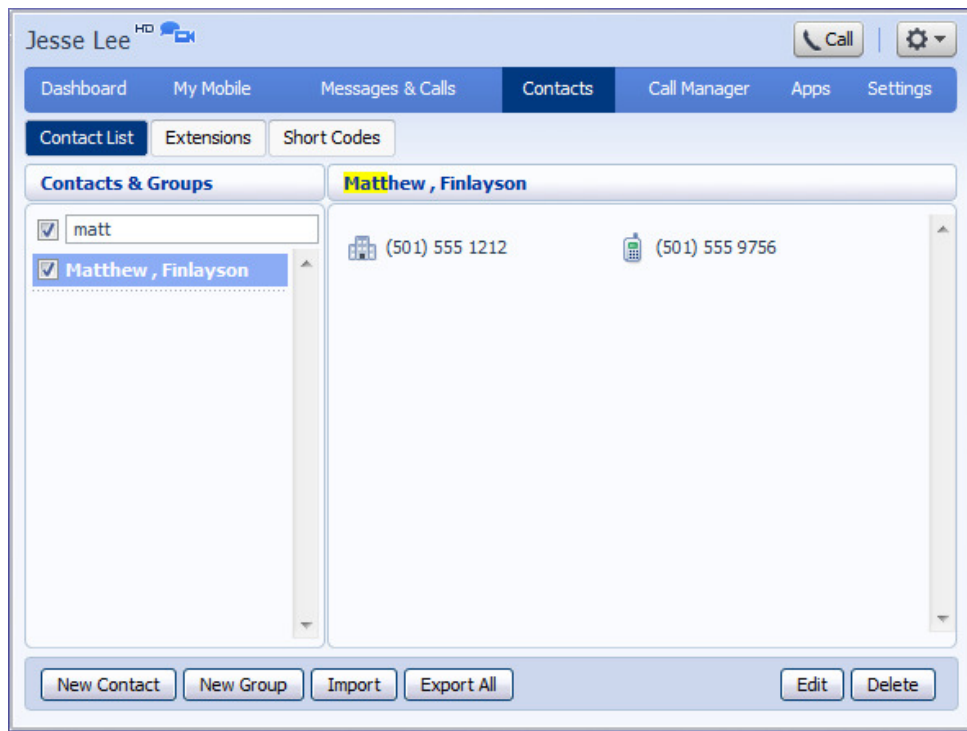
Figure 21: Contacts – Contact List tab



10.1.1 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:

Figure 22: Search contacts



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

10.1.2 Add a new contact

To add a new contact, follow these steps:

- Click on New Contact.

Figure 23: CommPortal new contact page

The screenshot displays the CommPortal interface for adding a new contact. At the top, the user's name "Jesse Lee" is shown with a "Call" button and a settings gear icon. Below this is a navigation bar with tabs for "Dashboard", "My Mobile", "Messages & Calls", "Contacts" (which is active), "Call Manager", "Apps", and "Settings". Under the "Contacts" tab, there are sub-tabs for "Contact List", "Extensions", and "Short Codes". The main area is titled "Contacts & Groups" and is split into two columns. The left column contains a list of existing contacts: "matt" and "Matthew , Finlayson", each with a checkbox. The right column is a form for adding a new contact, with fields for "First Name", "Last Name", "Nickname", "Job Title", and "Organization". Below these are five phone number fields labeled "Home", "Work", "Mobile", "Fax", and "Other", each with a corresponding icon and a radio button. At the bottom right of the form are "Save" and "Cancel" buttons.

- Enter the details for your new contact in the text boxes provided.

Figure 24: Completed new contact form

The screenshot shows a web application interface for managing contacts. At the top, the user is identified as 'Jesse Lee HD'. The navigation menu includes 'Dashboard', 'My Mobile', 'Messages & Calls', 'Contacts' (selected), 'Call Manager', 'Apps', and 'Settings'. Below the navigation, there are tabs for 'Contact List', 'Extensions', and 'Short Codes'. The main content area is titled 'Contacts & Groups' and features a list of contacts on the left, including 'matt' and 'Matthew , Finlayson'. The right side of the form is a detailed contact entry for 'Bob Smith', with fields for 'First Name', 'Last Name', 'Nickname', 'Job Title', and 'Organization'. Below these are fields for 'Home', 'Work', 'Mobile', 'Fax', and 'Other' phone numbers, each accompanied by a radio button to select the preferred number. The 'Work' number is '214-555-1212'. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

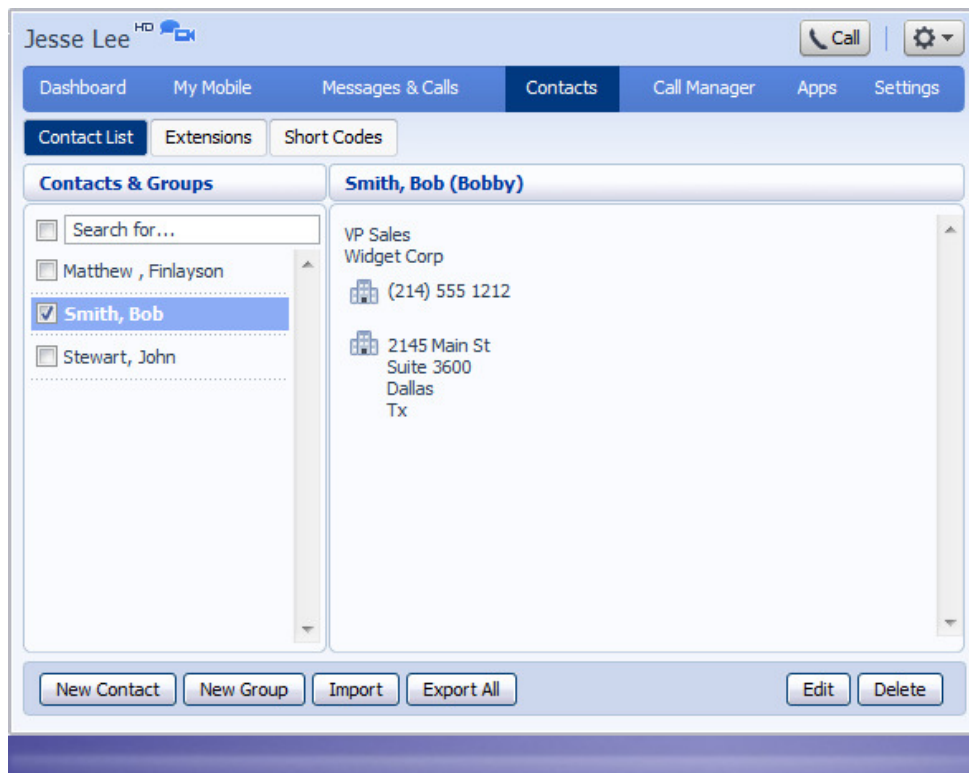
- Enter any phone numbers for your contact in the text boxes provided. You can select the radio button to the right of a number to indicate that it is the preferred number for this contact.
- Enter any addresses for your contact in the text boxes provided.

Figure 25: CommPortal new contact page

The screenshot displays the CommPortal interface for user Jesse Lee. The top navigation bar includes 'Dashboard', 'My Mobile', 'Messages & Calls', 'Contacts' (selected), 'Call Manager', 'Apps', and 'Settings'. Below this, there are sub-tabs for 'Contact List', 'Extensions', and 'Short Codes'. The 'Contact List' sidebar on the left shows a list of contacts: 'matt' and 'Matthew, Finlayson'. The main content area is titled 'Contacts & Groups' and contains a form for adding a new contact. The form fields are: Name (with a dropdown menu), Address (with a house icon), City, State, ZIP, and Country. There are also two additional address fields, one with a house icon and one with a building icon. At the bottom of the form, there are 'Save' and 'Cancel' buttons.

- Click Save.
Your new contact will now have been added.

Figure 26: CommPortal contact details



10.1.3 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*.

10.1.4 Deleting a contact

To delete a contact, follow these steps:

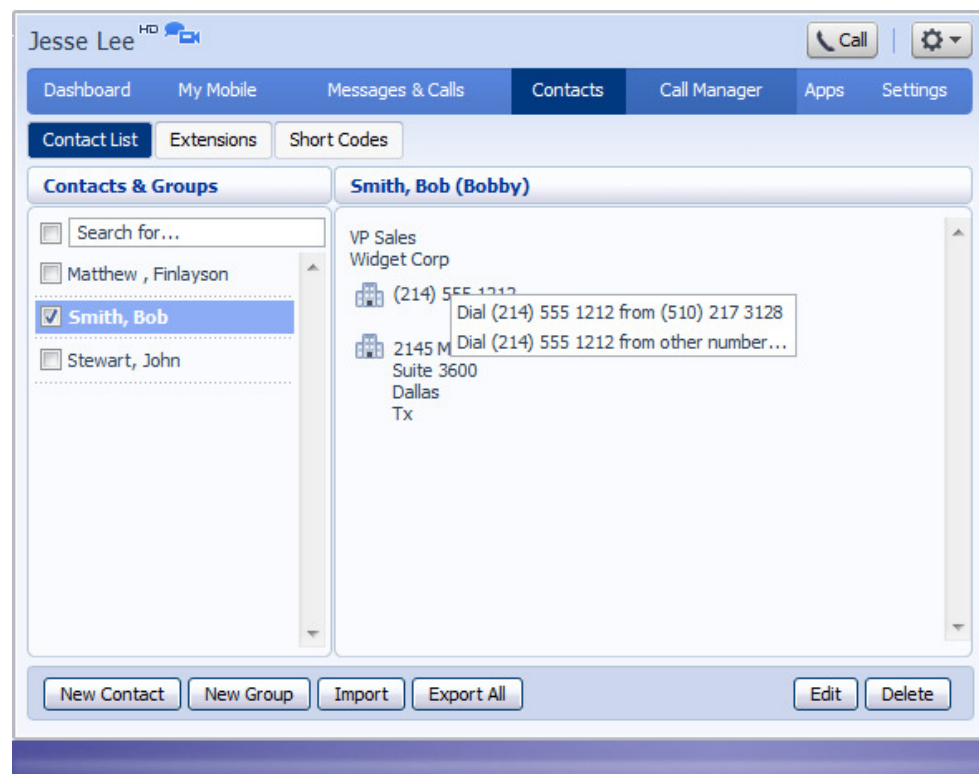
1. Select the contact you wish to delete from the list on the left hand side of the screen.
2. Click *Delete*.

10.1.5 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 *Dial* option.

Figure 27: Calling a contact from the Contact List tab



10.1.6 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.

To add a new group, follow these steps:

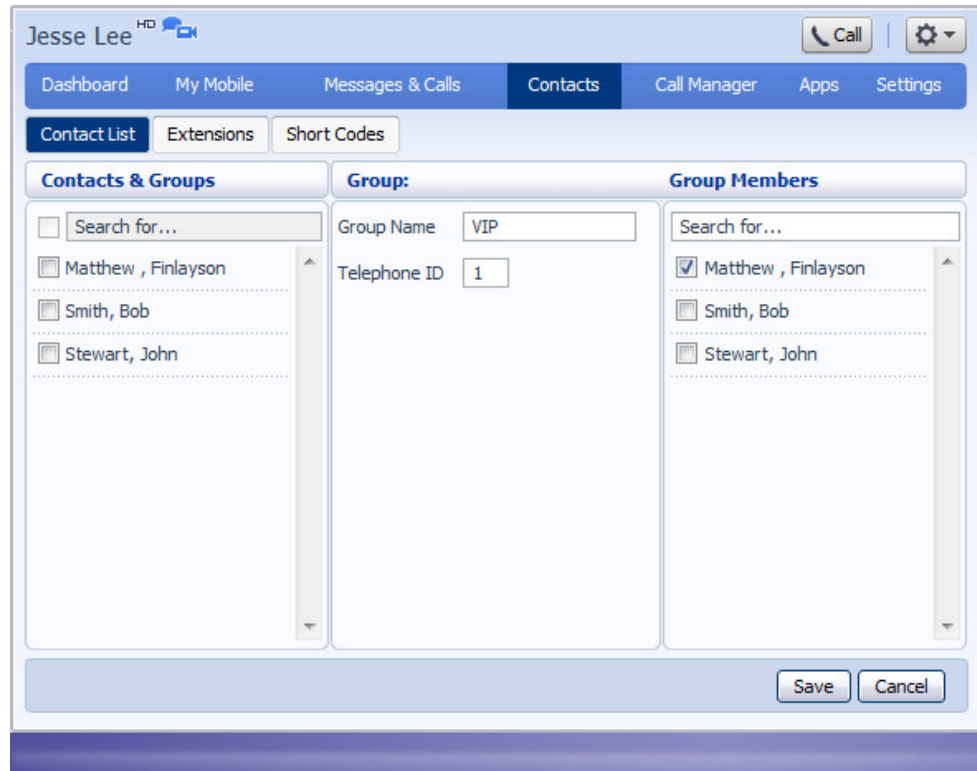
- Click on New Group.

Figure 28: Adding a new group

The screenshot shows a web interface for managing contacts. At the top, the user's name 'Jesse Lee' is displayed with a 'Call' button and a settings gear. Below this is a navigation bar with tabs for 'Dashboard', 'My Mobile', 'Messages & Calls', 'Contacts' (which is active), 'Call Manager', 'Apps', and 'Settings'. Under the 'Contacts' tab, there are sub-tabs for 'Contact List', 'Extensions', and 'Short Codes'. The main area is divided into three sections: 'Contacts & Groups', 'Group:', and 'Group Members'. The 'Contacts & Groups' section has a search bar and a list of contacts: Matthew, Finlayson; Smith, Bob; and Stewart, John. The 'Group:' section has input fields for 'Group Name' and 'Telephone ID'. The 'Group Members' section has a search bar and a list of the same three contacts. At the bottom right, there are 'Save' and 'Cancel' buttons.

- Enter a name for the group in Group Name.
- Enter an ID for the group in Telephone ID.
- Select any contacts you want to be in the group from the list on the right hand side.

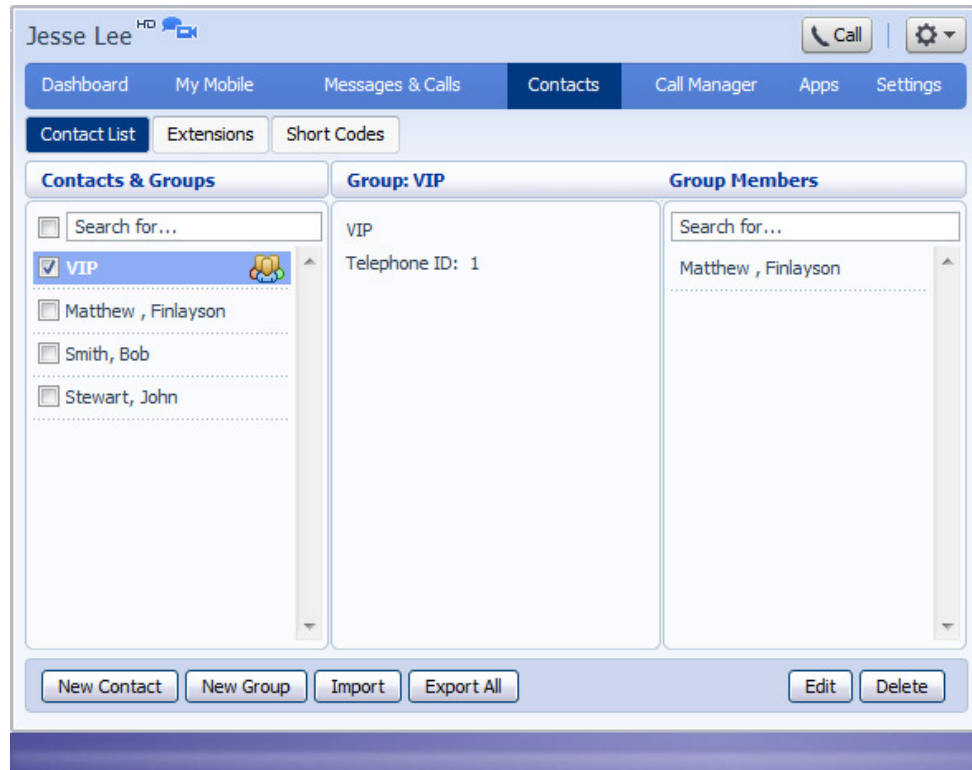
Figure 29: Adding a new group



- Click on Save.

The new group will now appear in the *Contacts & Groups* section:

Figure 30: Adding a new group



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 on the left hand side.
2. Click on *Edit*.
3. Change the group settings, or members.
4. Click on *Save*.

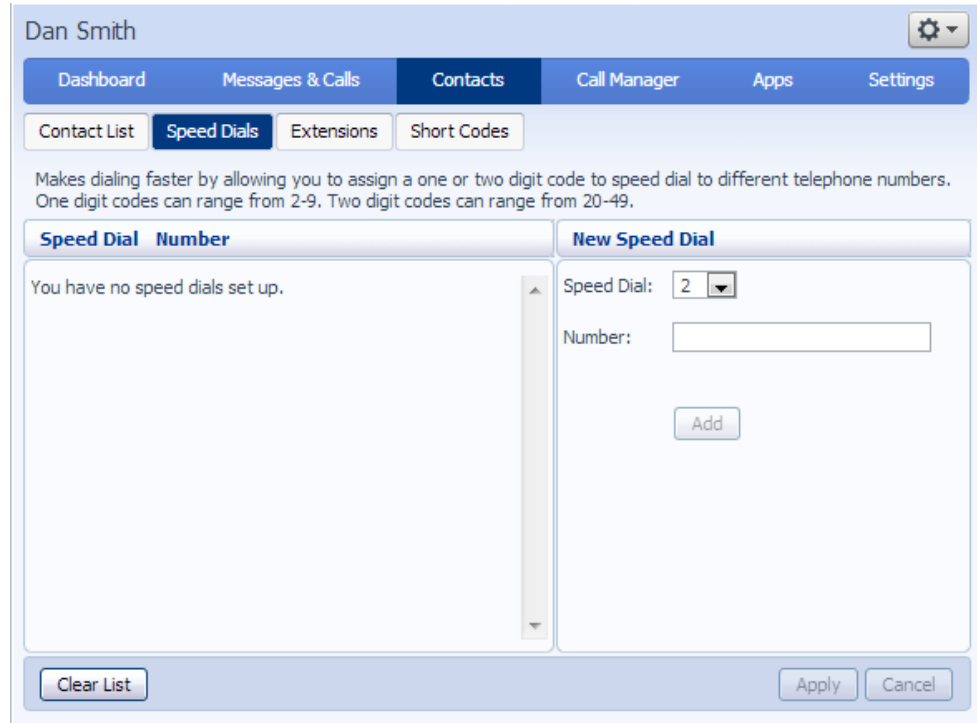
To delete a group, follow these steps:

1. Select the group on the left hand side.
2. Click on *Delete*.

10.2 Speed Dials

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

Figure 31: Contacts – Speed Dials tab



You use these speed dials by dialing 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. For more information on setting up speed dials on your phone's keys see Section 16.

10.2.1 Adding a speed dial

To add a speed dial, follow these steps:

1. Select the number for the speed dial 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.

Figure 32: Adding a speed dial

The screenshot shows a web interface for managing speed dials. At the top, there is a navigation bar with tabs for Dashboard, Messages & Calls, Contacts, Call Manager, Apps, and Settings. Below this is a sub-navigation bar with buttons for Contact List, Speed Dials, Extensions, and Short Codes. The main content area has a heading "Speed Dials" and a sub-heading "New Speed Dial". A table lists existing speed dials with columns for "Speed Dial" and "Number". To the right of the table is a form for adding a new speed dial, with fields for "Speed Dial" (a dropdown menu) and "Number" (a text input field). Below the form is an "Add" button. At the bottom of the interface are buttons for "Clear List", "Apply", and "Cancel".

Speed Dial	Number	
2	(214) 555 4242	✕
3	(510) 555 1212	✕

New Speed Dial

Speed Dial: 4 ▼

Number:

10.2.2 Deleting a speed dial

To delete a speed dial, follow these steps:

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

10.3 Extensions

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


Figure 33: Contacts – Extensions tab

Jesse Lee ^{HD}  

Dashboard My Mobile Messages & Calls **Contacts** Call Manager Apps Settings

Contact List **Extensions** Short Codes

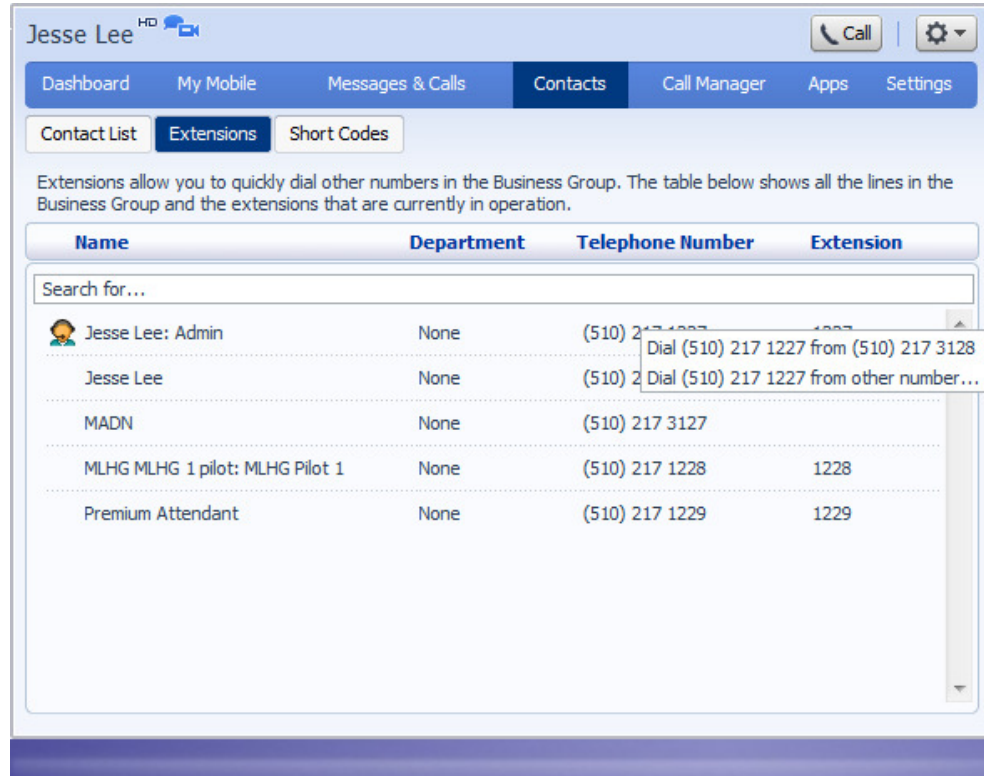
Extensions allow you to quickly dial other numbers in the Business Group. The table below shows all the lines in the Business Group and the extensions that are currently in operation.

Name	Department	Telephone Number	Extension
Search for...			
 Jesse Lee: Admin	None	(510) 217 1227	1227
Jesse Lee	None	(510) 217 3128	
MADN	None	(510) 217 3127	
MLHG MLHG 1 pilot: MLHG Pilot 1	None	(510) 217 1228	1228
Premium Attendant	None	(510) 217 1229	1229

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* option.

Figure 34: Using Click To Dial from the Extensions tab



Extensions allow you to quickly dial other numbers in the Business Group. The table below shows all the lines in the Business Group and the extensions that are currently in operation.

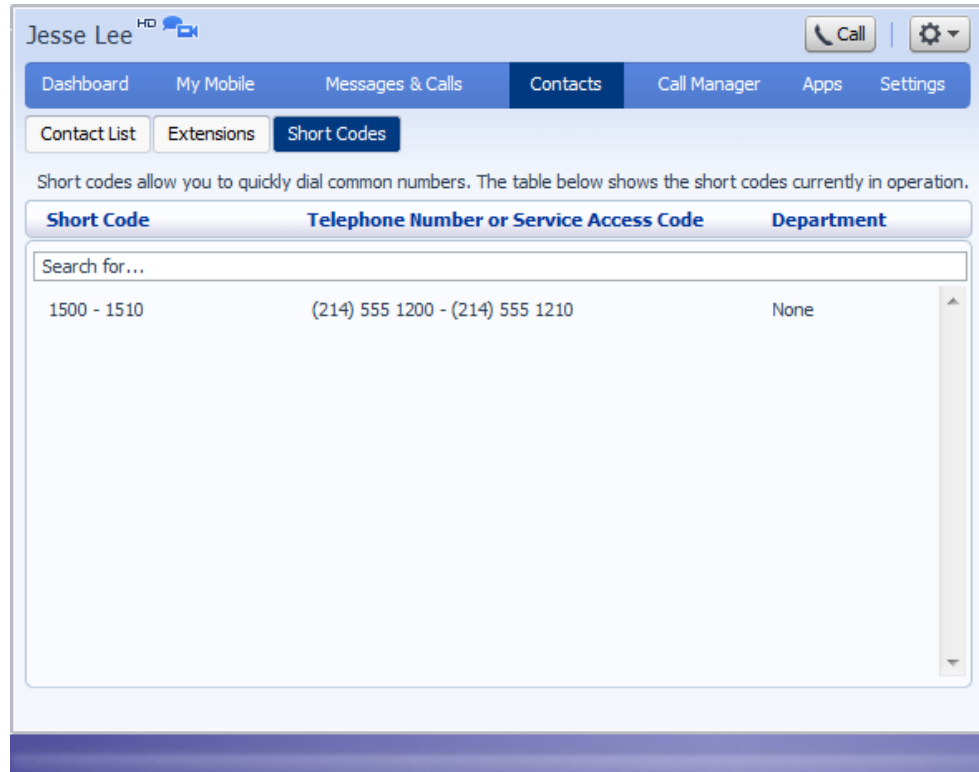
Name	Department	Telephone Number	Extension
Search for...			
Jesse Lee: Admin	None	(510) 217 1227	
Jesse Lee	None	(510) 217 1227	
MADN	None	(510) 217 3127	
MLHG MLHG 1 pilot: MLHG Pilot 1	None	(510) 217 1228	1228
Premium Attendant	None	(510) 217 1229	1229

Your administrator sets up these extensions.

10.4 Short codes

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

Figure 35: Contacts – Short Codes tab



The screenshot displays the 'Short Codes' tab within a contact management interface. At the top, the user's name 'Jesse Lee' is shown along with a 'Call' button and a settings icon. Below this, a navigation bar includes 'Dashboard', 'My Mobile', 'Messages & Calls', 'Contacts' (the active tab), 'Call Manager', 'Apps', and 'Settings'. Under the 'Contacts' tab, there are sub-tabs for 'Contact List', 'Extensions', and 'Short Codes'. A text box explains: 'Short codes allow you to quickly dial common numbers. The table below shows the short codes currently in operation.'

Short Code	Telephone Number or Service Access Code	Department
1500 - 1510	(214) 555 1200 - (214) 555 1210	None

You can dial these short codes from any phone in the business to reach the destination. Your administrator sets up these short codes.

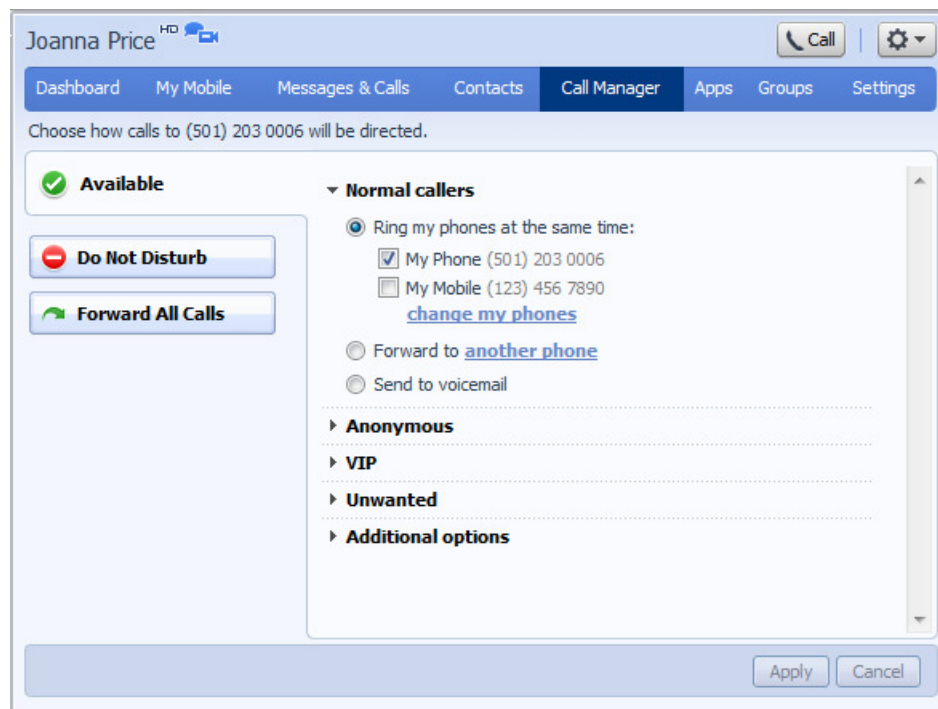
11 Easy Call Manager (ECM)

Easy Call Manager (ECM) is an easy-to-use call handling service, with a simple set of configurable profiles.

11.1 Available profile

The Available profile allows you to accept incoming calls and to configure your call handling options. For example, you may want your phone to ring as normal, or to receive calls simultaneously on a choice of phones to avoid missing a call. Additionally, you may want to apply special call handling rules for calls from specific numbers, for example, to screen calls from anonymous numbers, or to give priority to calls from VIP numbers and reject calls from unwanted numbers.

Figure 36: Available profile



11.1.1 Normal callers

You can choose from the following call handling options for calls from normal callers. Once you have made any changes, you should click *Apply* in the bottom right corner of the window to activate them.

Ring my phones at the same time

This allows you to have one or more phones ring for calls from normal callers. Your main phone number will be enabled by default. To add more phones, click on *add more phones*. The following popup will appear.

Figure 37: My Phones

Name	Number
My Phone	(112) 900 0005

You can now enter up to four other numbers that you want to ring. Each number must also have a name. You can remove a number by clicking on the Cross icon to the right of it. Once you have made your desired changes, click *OK* to apply them.

Each of your chosen numbers will now be listed under *Ring my phones at the same time*. Tick the boxes next to the phones that you want to ring for calls from normal callers.

Forward to another phone

This will forward all calls from normal callers to a phone number or contact of your choice. To set this number, click on *another phone*. In the Forwarding box that appears, enter the number or the name of your chosen contact and then click *OK*. You should then check the radio button to the left of the *Forward to option*.

Send to voicemail

This will send all calls from normal callers directly to voicemail. To enable this option, check the radio button next to it.

11.1.2 Anonymous callers

To view the available call handling options for anonymous callers, click on *Anonymous*. You can choose from the following options. Once you have made any changes, you should click *Apply* in the bottom right corner of the window to activate them.

Handle like Normal callers

When this option is enabled, calls from anonymous callers will be handled in the same way that you currently have set for normal callers.

You can also choose to screen calls from anonymous callers by checking the box next to *Ask caller to say their name before I accept the call*. When this option is activated, anonymous callers will be prompted to record their name. Once they have given their name, your phone will then ring and the name will be played to you. You can then decide whether you want to take the call or reject it.

Send to voicemail

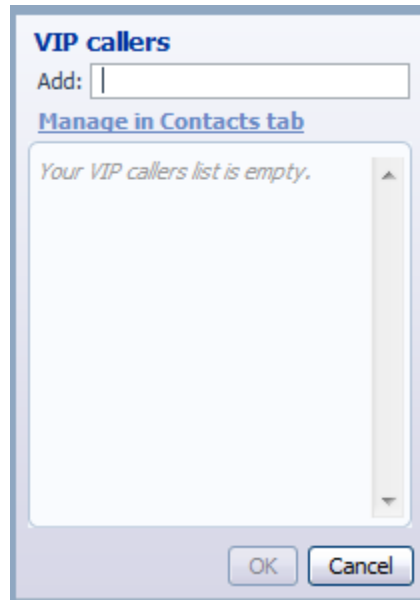
This will send all calls from anonymous callers directly to voicemail. To enable this option, check the radio button next to it.

11.1.3 VIP callers

The VIP section allows you to configure a group of priority callers and decide how calls from these contacts are routed. Once you have made any changes in this section, you should click *Apply* in the bottom right corner of the window to activate them.

To manage your list of VIP callers, expand the VIP section by clicking on *VIP* and then click on *Manage VIP callers*. The following box will appear.

Figure 38: VIP callers



You can add a contact to this list by typing a name or number in the *Add* field. Suggestions from your contact list will be given as you type. Once your chosen contact appears, you can simply click on their name. If you type a number that is not currently assigned to a contact, you will be given the option of adding this number as a new contact. After clicking on the *New Contact* option, you will be given a popup to fill out with details of the new contact.

Once you have clicked on your chosen contact or filled out the necessary details to add a new contact, this contact will be added to your list of VIP callers.

You can also remove currently configured VIP callers by clicking on the Cross icon to the right of their name.

When you have made all of your desired changes to your VIP callers list, click *OK* to apply them.

You can choose from the following call handling options for your VIP callers.

Ring my phones at the same time

This allows you to have one or more phones ring for calls from normal callers. Your main phone number will be enabled by default. To add more phones, click on *add more phones*. The *My Phones* popup will appear, as shown in Figure 37.

You can now enter up to four other numbers that you want to ring. Each number must also have a name. You can remove a number by clicking on the Cross icon to the right of it. Once you have made your desired changes, click *OK* to apply them.

Each of your chosen numbers will now be listed under *Ring my phones at the same time*. Tick the boxes next to the phones that you want to ring for calls from normal callers.

Forward to another phone

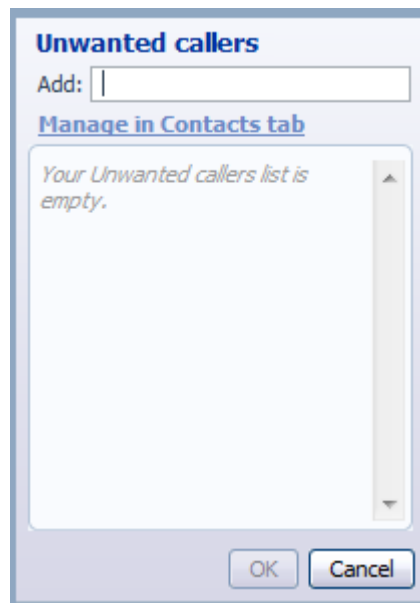
This will forward all calls from normal callers to a phone number or contact of your choice. To set this number, click on *another phone*. In the Forwarding box that appears, enter the number or the name of your chosen contact and then click *OK*. You should then check the radio button to the left of the *Forward to* option.

11.1.4 Unwanted callers

The Unwanted section allows you to configure a group of unwanted callers and decide how calls from these contacts are handled. Once you have made any changes in this section, you should click *Apply* in the bottom right corner of the window to activate them.

To manage your list of unwanted callers, expand the Unwanted section by clicking on *Unwanted* and then click on *Manage Unwanted callers*. The following box will appear.

Figure 39: Unwanted callers



You can add a contact to this list by typing a name or number in the *Add* field. Suggestions from your contact list will be given as you type. Once your chosen contact appears, you can simply click on their name. If you type a number that is not currently assigned to a contact, you will be given the option of adding this number as a new contact. After clicking on the *New Contact* option, you will be given a popup to fill out with details of the new contact.

Once you have clicked on your chosen contact or filled out the necessary details to add a new contact, this contact will be added to your list of unwanted callers.

You can also remove currently configured unwanted callers by clicking on the Cross icon to the right of their name.

When you have made all of your desired changes to your unwanted callers list, click *OK* to apply them.

You can choose from the following call handling options for these callers.

Reject

This will reject all calls from unwanted callers.

Send to voicemail

This will send all calls from unwanted callers directly to voicemail. To enable this option, check the radio button next to it.

11.1.5 Additional options

If you have chosen the Ring my phones option for your normal or VIP callers, you can use the Additional options section to configure how a call from one of these callers will be handled if you do not answer or you are already in a call.

For both of these situations, you can choose to do the following.

Forward to another phone

This will forward unanswered calls to a phone number or contact of your choice. To set this number, click on *another phone*. In the Forwarding box that appears, enter the number or the name of your chosen contact and then click *OK*. You should then check the radio button to the left of the *Forward to* option.

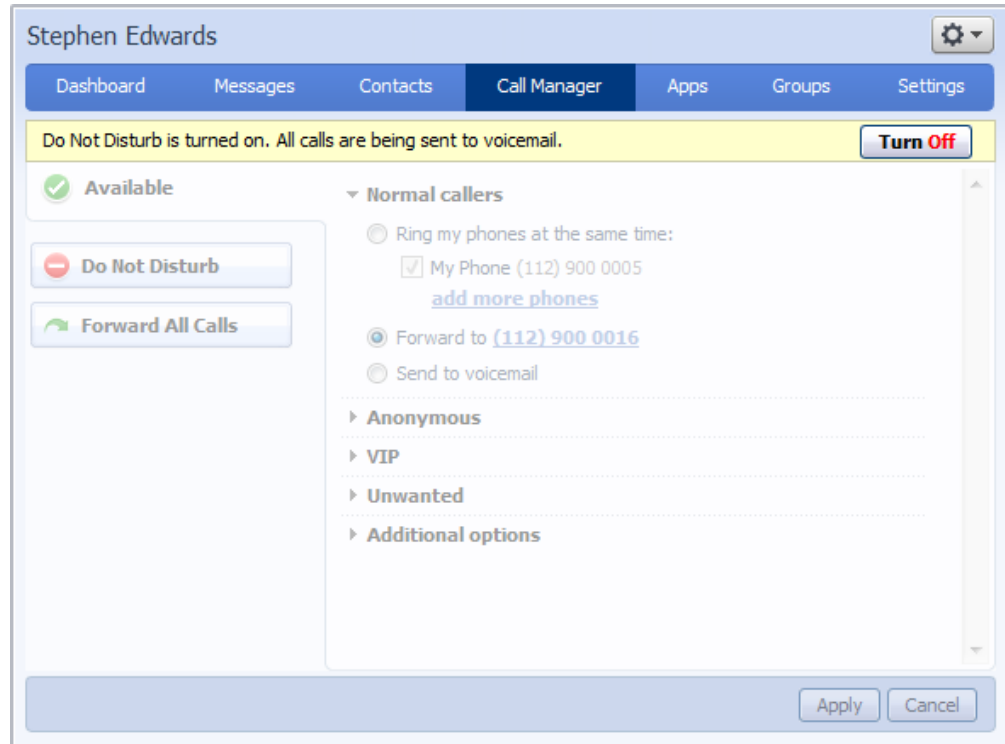
Send to voicemail

This will send unanswered calls to voicemail. To enable this option, check the radio button next to it.

11.2 Do Not Disturb profile

The Do Not Disturb profile allows you to send all incoming calls directly to voicemail without ringing your phone. To activate the Do Not Disturb profile, click the *Do Not Disturb* button on the left hand side of the *Call Manager* tab.

Figure 40: Do Not Disturb profile



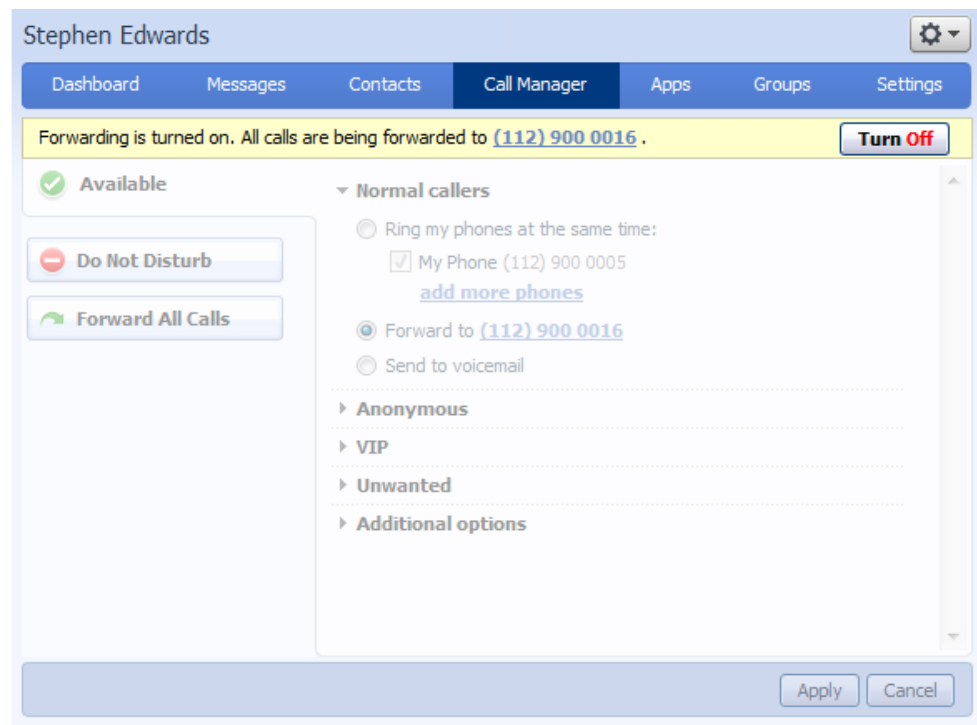
To turn the Do Not Disturb profile off again, click the *Turn Off* button in the top right hand corner of the Call Manager tab. You will not be able to make any changes in the *Call Manager* tab while the Do Not Disturb profile is turned on.

11.3 Forward All Calls profile

The Forward All Calls profile will forward all incoming calls to the phone number of your choice.

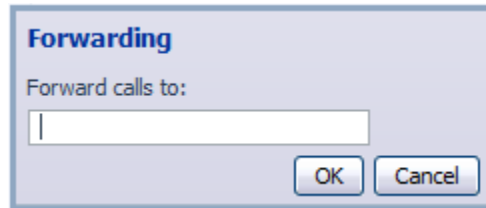
To activate the Forward All Calls profile, click on the *Forward All Calls* button on the left hand side of the *Call Manager* tab. If you have already configured a forwarding number using the Available profile, the Forward All Calls profile is activated and will forward calls to this number. A yellow bar will appear at the top of the Call Manager tab to inform you where calls are being forwarded to. If you want to change this number, simply click on it.

Figure 41: Forward All Calls profile



If you have not already configured a forwarding number using the Available profile or you have decided to change the pre-configured number, you will see the following pop-up.

Figure 42: Forwarding



Enter the number or the name of the contact that you want to forward calls to and then click *OK*. The Forward All Calls profile will then be activated and will forward all calls to this new number.

To turn the Forward All Calls profile off again, click the *Turn Off* button in the top right hand corner of the Call Manager tab. You will not be able to make any changes in the *Call Manager* tab while the Forward All Calls profile is turned on.

12 Incoming Call Manager (ICM)

Incoming Call Manager provides you with a powerful rules based routing services allowing you to configure when, where and which calls are delivered to you. You can use the advanced rules based routing to configure an advanced Sets of Rules for your incoming calls. For example, you might want to forward calls from family and friends to a home phone, while forwarding calls from the office directly to voicemail, or to screen calls from a particular number.

To configure Incoming Call Manager follow the steps defined in this section.

- Summary gives you a description of what will happen to incoming calls.
- Rules allows you to view and change your Call Forwarding settings.
- Follow Me lets you view and set up an advanced Find Me Follow Me service.
- Screening lets you screen different types of incoming calls.

Each of these sections is described in more detail below.

12.1 Summary

The Call Manager summary page provides you with a single view of how your calls are currently routing and is the CommPortal interface for changing your ICM forwarding setting. From this page you can quickly change your forwarding settings by selecting a radio button under the *When I Receive a Call* section.

Figure 43: CommPortal Incoming Call Manager summary page

Jesse Lee ^{HD}

Dashboard My Mobile Messages & Calls Contacts **Call Manager** Apps Settings

Summary Rules Weekly Schedule Special Days

When I receive a call

Ring my phone

Forward to (214) 724 4136

Send to voicemail

Call Manager lets you decide who, how and when callers can reach you. [Learn more](#)

Set up [rules](#) for more advanced control.

Set a [weekly schedule](#) to apply different rules based on time, or day of the week.

▼ **Additional options**

These options apply in all cases where you've chosen to have your phone ring.

If I don't answer:

Forward to <enter a number>

Apply Cancel

12.2 Rules based routing

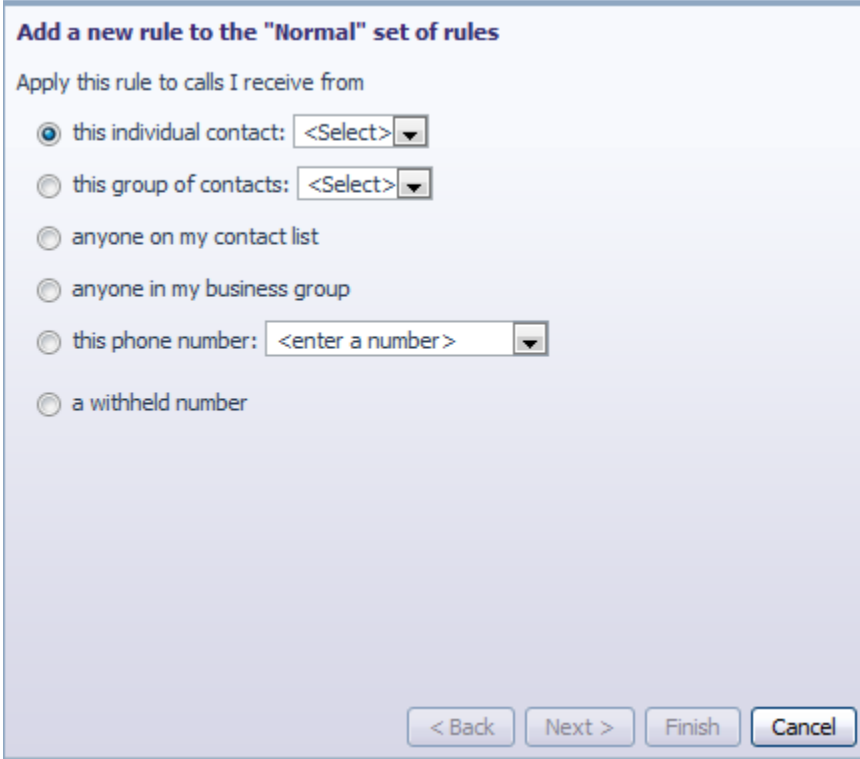
Rules based routing allows you to configure how calls are routed based on the number that is calling you. Rules based routing is configured by selecting the Rules tab on the Call Manager page.

If you are setting up rules for the first time, a short description of rules based routing is displayed along with a link to "Get Started with some Typical Sets of Rules". By selecting this link, three sets of rules will be created: "Normal", "Reject Calls and "Screen Calls". You can add more sets by clicking the *Add New Set of Rules* button. Alternatively, sets can be deleted by clicking the Cross icon next to their name.

You can view the rules in a set by clicking on the set's name.

To define a new rule for a set of rules, highlight the set of rules that you want to add a rule to and then click the *Add New Rule* button.

Figure 44: Adding a new rule



Add a new rule to the "Normal" set of rules

Apply this rule to calls I receive from

- this individual contact:
- this group of contacts:
- anyone on my contact list
- anyone in my business group
- this phone number:
- a withheld number

< Back Next > Finish Cancel

Begin configuring your rule by selecting which caller or callers the rule will apply to. The options are:

- This individual contact - Apply to individual contact (in your contact directory)
- This group of contacts - Apply to a group of contacts as defined in my contact directory.

- Anyone in my contact list – Apply to all callers for which you have a contact defined.
- Anyone in my business group – Apply to all other members of your business, with the hosted PBX service.
- This phone number – Apply to a specific phone number. Can be any number.
- A withheld number – Apply to any caller that have restricted their calling number.

Select the individual or group of callers that this rule will apply to and click the *Next* button.

Figure 45: Adding a new rule

Add a new rule to the "Normal" set of rules

When I receive a call from anyone in my business group

- have my phone ring using
- send the call to voicemail
- forward the call to
- inform the caller that I am not available and reject the call
- prompt the caller to record his or her name, then ring my phone and ask me whether I wish to accept the call
- try to reach me by having more than one phone ring, together or in sequence
- prompt the caller to record his or her name, then try to reach me by having more than one phone ring and ask me whether I wish to accept the call

< Back Next > Finish Cancel

Next you will select how the system will route your calls when you receive a call from the selected user or group. The available routing options are:

- Ring your phone with a standard or distinctive ringtone
- Send the call to voicemail
- Forward the call to another number
- Inform the caller that you are unavailable and reject the call
- Prompt the caller to record their name then prompt you to accept or reject the call

- Ring more than one phone simultaneously or in sequence
- Prompt the caller to record their name then ring more than one phone and prompt you to accept or reject the call.

If the routing option that you select *does not* involve more than one phone being called, you can click *Finish* to complete your rule configuration.

If the routing option that you select *does* involve more than one phone being called, you must now click the *Next* button and follow the steps below to configure which phones will be called and for how long.

Figure 46: Adding a new rule

1. Add the first phone number to ring by entering a number in the Phone Number field
2. Enter the start ring time and end ring time for the phone (one ring cycle is 6 seconds, however for mobile phones, you may have to allow more time depending on the mobile networks post dial delay)
3. Click the *Add* button.
4. Continue to add numbers as defined in steps 1-3 until all numbers have been added.
5. Select the preferred ringtone for your desk phone.
6. Select the number to transfer calls to in the event the lines are all busy or not answered. You can choose your voicemail or any dialable number.

7. Click *Finish*.

You can change any of the rules you have created by highlighting your chosen rule and then clicking the *Edit* button. Rules can be removed by clicking the Cross icon to the right.

All sets of rules also have a default rule. This rule will be used when no other rules have been configured in the set, or if a call is received from a number that is not associated with a rule. For example, if you do not have a rule configured for calls from anonymous numbers, the default rule will be used.

To edit a default rule, highlight it by clicking on it, and then click the *Edit* button.

From the page that appears, you can decide what action should be taken with calls from numbers that do not match a rule in the set. You can choose from the following.

- Ring your phone with a standard or distinctive ringtone
- Send the call to voicemail
- Inform the caller that I am unavailable and reject the call
- Prompt the caller to record their name then prompt you to accept or reject the call
- Ring more than one phone simultaneously or in sequence
- Prompt the caller to record their name then ring more than one phone and prompt you to accept or reject the call.

Figure 47: Incoming Call Manager – Rules tab

When no rules apply in the "Normal" set of rules

When no rules apply

- have my phone ring using
- send the call to voicemail
- forward the call to
- inform the caller that I am not available and reject the call
- prompt the caller to record his or her name, then ring my phone and ask me whether I wish to accept the call
- try to reach me by having more than one phone ring, together or in sequence
- prompt the caller to record his or her name, then try to reach me by having more than one phone ring and ask me whether I wish to accept the call

Once you have made your selection, click *Finish*.

12.3 Schedule based routing

The Weekly Schedule functionality of Incoming Call Manager allows you to apply different routing rules based on time of day and day of week. For instance you may want all calls to ring your desk phone during working hours and ring your mobile phone during lunch or after business hours. When first configuring your weekly schedule, you will be presented with two options.

1. Begin with a blank weekly schedule that you can set up from scratch.
2. Begin with a typical weekly schedule that you can fine tune.

For ease of use, select option 2 - Begin with a typical weekly schedule that you can fine tune, and follow the steps below.

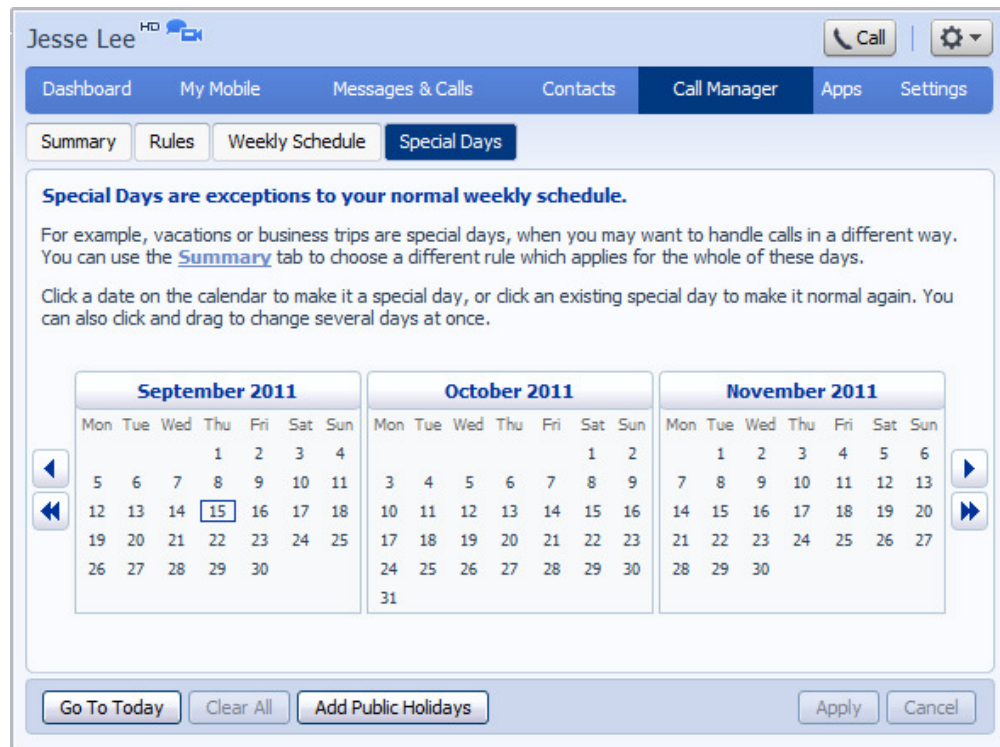
Figure 48: Incoming Call Manager – Weekly Schedule tab

1. Select the period that you want to modify.
2. Using your mouse, point to the day and time you want to change and click the mouse. To change multiple time periods, left click and hold the mouse button and drag across the days and time periods you wish to change.
3. To rename a period, click the rename button and enter the new name.
4. Click *Apply*.



12.4 Special days (holidays)

You can define special days such as holidays or days when you are away from the office and would like special call treatments. To configure special days, select the Special Days tab and follow the steps below:

Figure 49: Incoming Call Manager – Special Days tab



To select individual special days:

1. Select the month using the  key and the year using the  Key
2. Click on an individual day, or click and drag to select multiple days
3. Click *Apply*

To have the system automatically define public holidays:

1. Click on the “Add Public Holidays” button
2. Select the holidays you wish to add (US Public Holidays)
3. Click *Apply*

13 Groups

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

Figure 50: CommPortal Groups page



There are a number of different types of groups:

- **Multi Line Hunt Group.** When a call comes in to a Multi Line 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 Multi Line Hunt Group you may be able to log in and out of the Multi Line Hunt Group. When you're logged in calls to that Multi Line 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 of *11.
- **Multiple Appearance Directory Number.** This is a special phone number that, when called, will ring all of the phones within the Multiple Appearance Directory Number group. The first person to answer their phone will take the call, at which point all the other phones will stop ringing.

13.1 Multi Line Hunt Groups

13.1.1 Viewing Multi Line Hunt Groups

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

Figure 51: Groups – Multi Line Hunt Groups

The screenshot shows the SL2a user interface. At the top, there are navigation tabs: Dashboard, Messages & Calls, Contacts, Call Manager, Apps, Groups (selected), and Settings. Below the tabs, a message states: "The table below lists the MLHGs and Call Pickup Groups (CPUGs) you are a member of. Click on one of the groups to view detailed information." Underneath, there is a "Group Membership" section with a list containing "MLHG: mlg1". To the right of this list, the details for "MLHG: mlg1" are displayed. It shows "Number of Lines: 5 (Logged in: 5)" and "Status: You are currently logged in to this MLHG". Below this, a table lists the group members:

Position	Number	Extension	Name
1	(361) 203 9060		SL2a
2	(361) 203 9061		SL2b
3	(361) 203 9062		SL2c
4	(361) 203 9063		SL2d
5	(361) 203 9064		SL2e

At the bottom right of the interface, there is an "Agent status" button.

The following information is shown:

- What department this Multi Line 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.
- If you have the Integrated ACD feature enabled, there is an *Agent Status* button at the bottom right of the screen that you can click to access the Agent Status page described in 13.1.3.

13.1.2 Using Multi Line Hunt Groups

Calls that come into your phone line from a Multi Line 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 Multi Line Hunt Group you can either use CommPortal to log in and out, or you can use your phone.

Using Your Phone


To log into a Multi Line Hunt Group using your phone, follow these steps:


1. Pick up your phone handset.
2. Dial the Multi Line Hunt Group login access code: *97 followed by the number of the Multi Line Hunt Group.

To log out of a Multi Line Hunt Group using your phone, follow these steps:

1. Pick up your phone handset.
2. Dial the Multi line Hunt Group logout access code: *97.

Using CommPortal

To log into the Multi Line 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: 

13.1.3 Using the Agent Status screen

The *Agent Status* screen shows information on the MLHG(s) that you belong to. It also displays caller information when you receive an incoming call, if you are able to see incoming call pop-ups.

On this screen, an MLHG is referred to as a Queue and an MLHG member as an Agent.

- To access the screen, click on the *Agent Status* button on the *Groups* page in CommPortal. This launches the screen shown in Figure 52 in a new browser window.
- You can bookmark this page so that you can reach it directly from your browser rather than having to go through the CommPortal interface.

Figure 52: Agent Status screen

The screenshot shows the 'Agent Status' interface. At the top right, it says 'Logged in as: typ3'. Below this, there is a section for an 'Incoming Call from: 3612032701'. This section contains a table with the following data:

	Waiting time	Callers waiting	Logged-in members	Queue Status
typ_mlhg1	0:55	1	3	Logged In

Below the incoming call section is a 'My Queues' section, which contains a larger table with the following data:

	Waiting time	Callers waiting	Logged-in members	Queue Status
typ_mlhg1	0:55	1	3	Logged In
'aeit2	0:00	0	3	Logged In
aeit1'	0:00	0	2	Logged In
elntmlhg1	0:00	0	3	Logged In
elntnew	0:00	0	1	Logged In
mlghelnt3	0:00	0	3	Logged In
mlhg	0:00	0	3	Logged In
typ_mlhg2	0:00	0	0	Logged Out

On the top panel, you can see details of a current incoming call. If your phone is not currently ringing, this panel will say 'No incoming call'.



- When you have an incoming call, you will be able to see information about the caller. This may include their telephone number and name, if that information can be determined.
 - If the call arrived via a Queue, you will also be able to see information about the Queue that was originally called.
 - If the call did not arrive via a Queue, you will a message saying 'No matching queue'.
 - If an incoming call stops ringing for any reason (for example, it was answered by another agent or the caller hung up), the incoming call details will fade out over a few seconds. .

On the *My Queues* panel, you can see real-time information on all the Queues that you are a member of. These statistics are refreshed every 30 seconds and whenever an incoming call starts ringing.

- For each Queue, the screen shows:
 - Logged-in members.
This is the number of agents who are currently logged in.
 - Callers waiting.
This shows how many callers are currently waiting in a queue because all agents are busy.

- Once a call has been hunted to a particular agent, they are not counted here, even if the agent has not yet answered the call.
- If the Queue only accepts calls when an agent is available, this statistic will be shown as n/a.
- Waiting time.

This is the running average for the most recently answered calls of how long a caller waits before their call is answered. The value is the sum of the time a caller is waiting in a queue and the time the call is alerting (that is, the call has been hunted to an agent and agent's phone is ringing) before it is answered.

- The list of Queues also indicates whether or not you are logged in to each Queue. Where it is permitted, you can use this screen to log in and out of a Queue.
- If a Queue does not offer login/logout, you will be shown as Logged In and cannot change this.
- If a Queue offers login/logout, you can use the  and  buttons to toggle between being logged in and out of a Queue.

You can only be logged in to one Queue that supports explicit login/logout.

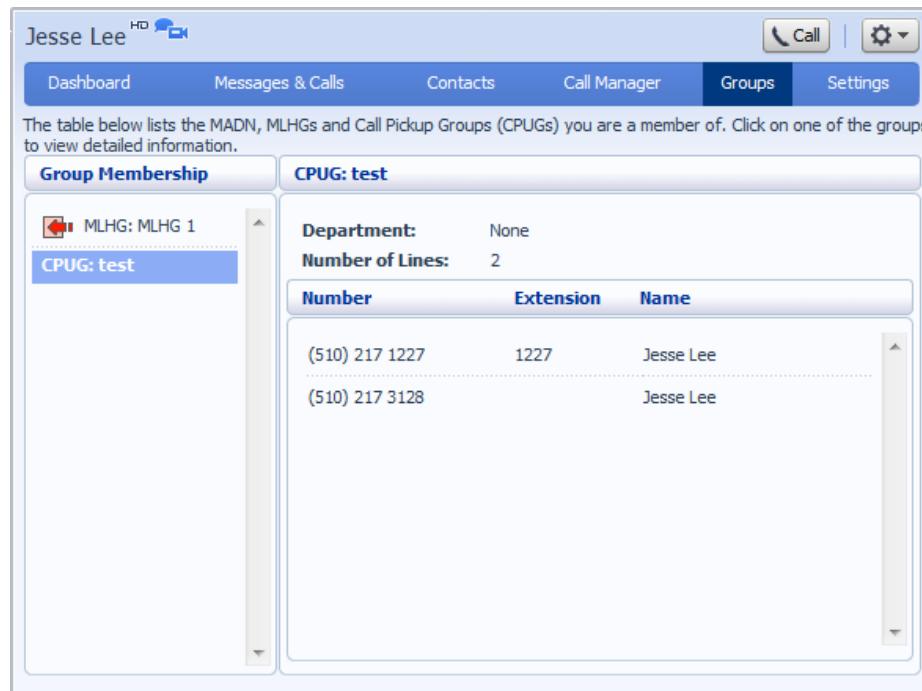
- If you attempt to log in to a new Queue while you are already logged in to another Queue, you will see a pop-up informing you that you are about to be logged out of the original Queue. This will give you the option to continue with changing the Queue you are logged in to or canceling the action and remaining in the original Queue.

13.2 Call Pickup Groups

13.2.1 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 *CPUG:* Click on this entry to view that Call Pickup Group:

Figure 53: Groups – Call Pickup Groups



The screenshot shows a user interface for 'Jesse Lee' with a navigation bar containing 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Groups', and 'Settings'. Below the navigation bar, a message states: 'The table below lists the MADN, MLHGs and Call Pickup Groups (CPUGs) you are a member of. Click on one of the groups to view detailed information.'

The 'Group Membership' section on the left lists 'MLHG: MLHG 1' and 'CPUG: test'. The 'CPUG: test' section on the right displays the following information:

Department: None
Number of Lines: 2

Number	Extension	Name
(510) 217 1227	1227	Jesse Lee
(510) 217 3128		Jesse Lee

The following information is shown:

- 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.

13.2.2 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.

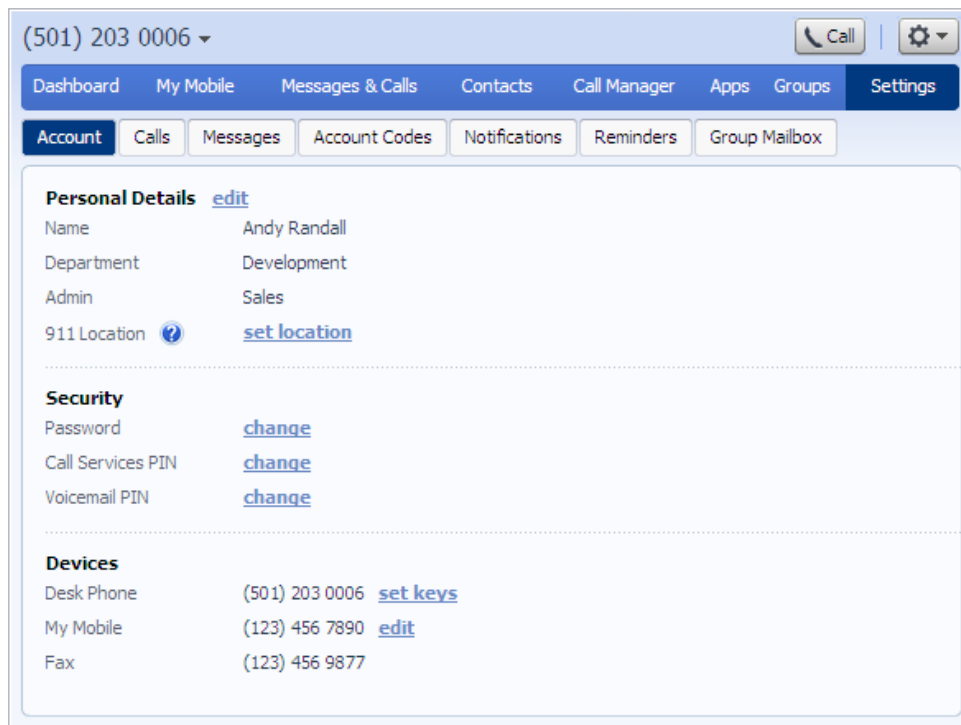
Alternatively, if two or more phones are ringing and you want to pick up the call that is ringing on a particular extension number, follow these steps:

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.

14 Settings

The Settings page consists of a series of tabs allowing you to configure the phone system:

Figure 54: CommPortal Settings page

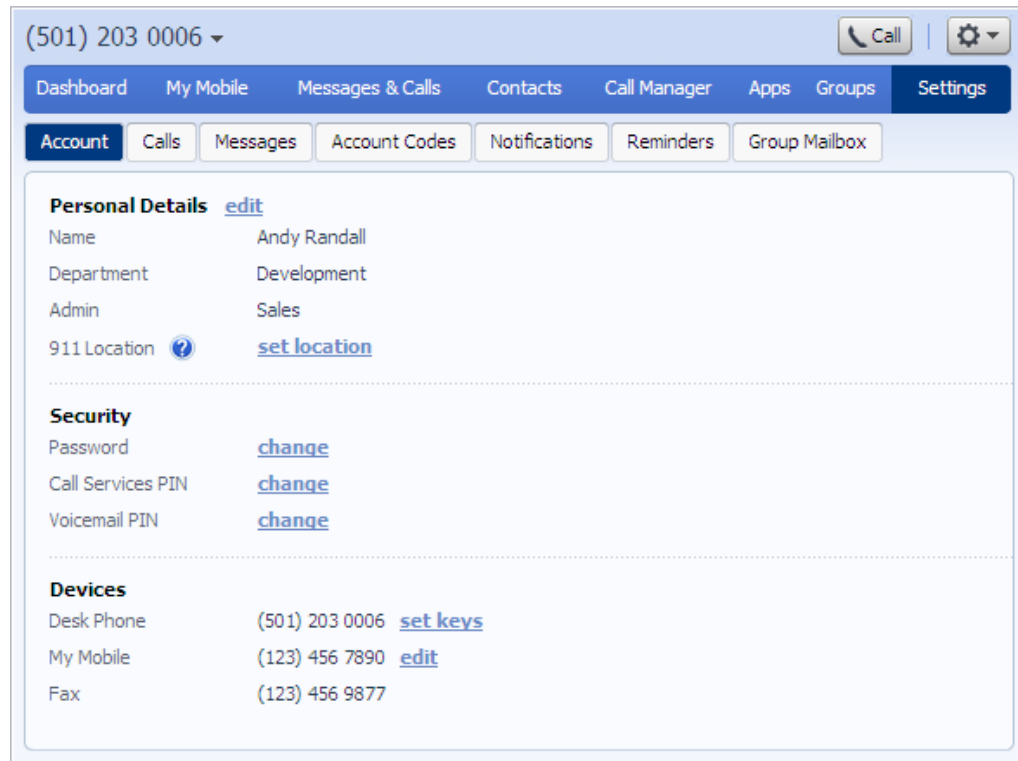


- Account allows you to configure and change some of the settings for your account.
- Calls allows you to configure your call service options.
- Messages allows you to configure your messaging settings.
- Account Codes lets you set up your account codes, if you have appropriate permissions.
- Notifications lets you set options for how you wish to receive notifications whenever a new message arrives for you.
- Reminders lets you manage your reminder calls.

14.1 Account

The Account tab 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.

Figure 55: Settings - Account tab



The page is divided into the following panels.

Personal Details

The Personal Details panel shows you information about your line:

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

If your service provider allows you to use your phone in more than one location, this panel also allows you to set your current location for 911 calls. It is important that you set your location, because your SIP deskphone allows you to make calls using the same phone number anywhere you can access the internet, and without this information, those calls cannot be directed to a local emergency operator.

Security

The Security panel allows you to change your Account Password.

To change your CommPortal password, follow these steps:

1. Click the *Change* link next to *Account 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*.

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, which is described in Chapter 16.

14.2 Calls

The Calls tab allows you to configure your call service options.

Figure 56: Settings - Calls tab

(501) 203 0006 ▾

Dashboard My Mobile Messages & Calls Contacts Call Manager Apps Groups Settings

Account Calls Messages Account Codes Notifications Reminders Group Mailbox

▼ General

Auto-answer my phone for click-to-dial calls

Call transfer number

Allow callers to send numeric pages

Withhold caller ID when making calls

If not withheld, signal my name as:

Display caller name for incoming calls

Display caller number for incoming calls

▶ Call Forwarding

▶ Call Blocking

▼ Call Jump

Enter phone numbers you may want to transfer calls to.

Alternate

Apply Cancel

- 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

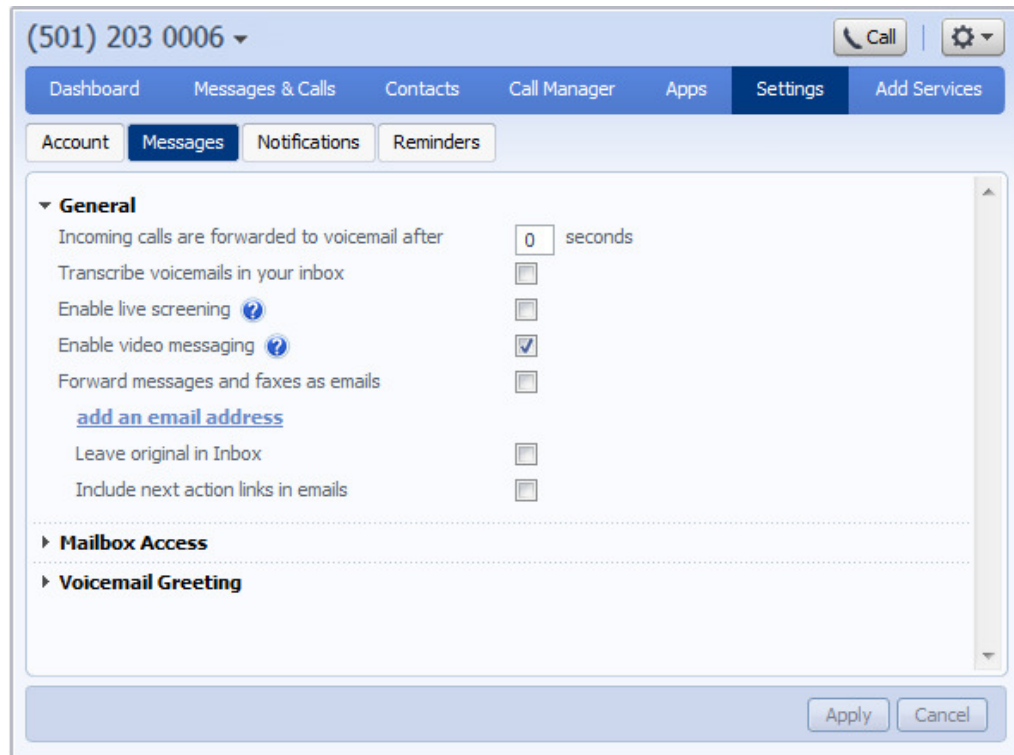
The Call Me Buttons panel allows you to enable or disable your Call Me service and to cancel your existing buttons. If you disable the buttons by un-checking the *Enable Call Me Buttons* checkbox, potential callers who attempt to call you, for example by using a Call Me button that you had already included 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.

14.3 Messages

The Messages tab lets you change the operation of your voice and fax messaging service, and has a series of sections.

Figure 57: Settings - 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. This feature is only available for Premium User Seats.
- 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 in your inbox or whether they should be deleted.

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 additional audio greetings, for example greetings to be used out-of-hours or during an extended absence Note: You must have a USB headset attached to your PC in order to record greetings from CommPortal.

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

14.4 Account Codes

The Account Codes tab 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.

Figure 58: Settings - Account Codes tab

The screenshot shows the 'Account Codes' settings page for a user named Stephen Edwards. The page has a navigation bar with tabs for Dashboard, Messages, Contacts, Call Manager, Apps, Groups, and Settings. Below this is a sub-navigation bar with tabs for Account, Calls, Messages, Account Codes (selected), and Notifications. The main content area is titled 'Choose which types of phone numbers require a code before dialing.' It is divided into two sections: 'Personal' and 'Business Group'. The 'Personal' section shows a message: 'You have no personal account codes assigned.' The 'Business Group' section is titled 'Account Code Options' and contains a list of call types requiring an account code. The options are: Local (unchecked), Regional (checked), National (checked), International (checked), Premium Rate (checked), Operator (checked), Directory (checked), Carrier Dialed (checked), Local Business Group (unchecked), and Other Business Group (unchecked). Below this list are three input fields: 'Use validated account codes' (checked), 'Account code length' (4), and 'Max incorrect attempts before account is blocked' (10). There is an 'Unlock Account Codes' button at the bottom right of the 'Business Group' section. At the bottom of the page, there are three buttons: 'Edit Personal Account Codes', 'Apply', and 'Cancel'.

Stephen Edwards

Dashboard Messages Contacts Call Manager Apps Groups Settings

Account Calls Messages Account Codes Notifications

Choose which types of phone numbers require a code before dialing.

Personal | Business Group

You have no personal account codes assigned.

Account Code Options

Call types requiring an account code

Local Operator

Regional Directory

National Carrier Dialed

International Local Business Group

Premium Rate Other Business Group

Use validated account codes

Account code length:

Max incorrect attempts before account is blocked:

Unlock Account Codes

Edit Personal Account Codes Apply Cancel

For more details on the account codes services, see section 6.4 or speak to your administrator.

14.4.1 Account code options

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

Figure 59: Account Code Options

Account Code Options

Call types requiring an account code

<input type="checkbox"/> Local	<input checked="" type="checkbox"/> Operator
<input checked="" type="checkbox"/> Regional	<input checked="" type="checkbox"/> Directory
<input checked="" type="checkbox"/> National	<input checked="" type="checkbox"/> Carrier Dialed
<input checked="" type="checkbox"/> International	<input type="checkbox"/> Local Business Group
<input checked="" type="checkbox"/> Premium Rate	<input type="checkbox"/> Other Business Group

Use validated account codes

Account code length:

Max incorrect attempts before account is blocked:

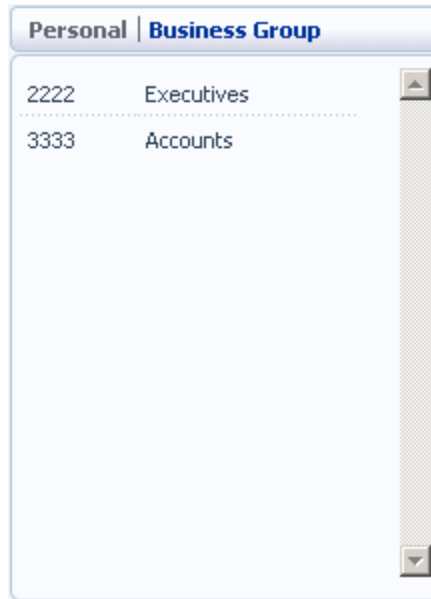
[Unblock Account Codes](#)

- 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.

14.4.2 Business account codes

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

Figure 60: Business account codes



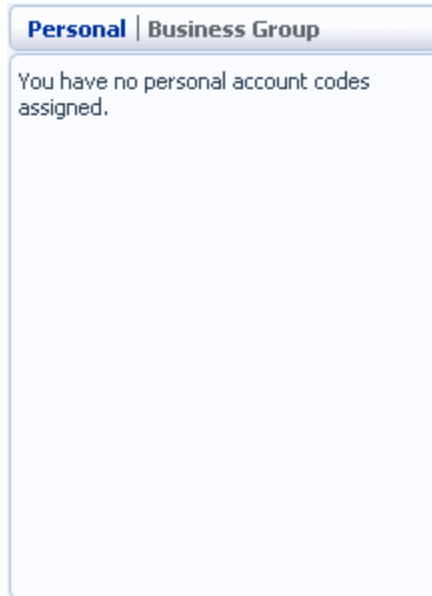
The screenshot shows a web interface with two tabs: 'Personal' and 'Business Group'. The 'Business Group' tab is selected. Below the tabs is a list of account codes and their corresponding group names. The list contains two entries: '2222 Executives' and '3333 Accounts'. The list is enclosed in a light blue border and has a vertical scrollbar on the right side.

Account Code	Group Name
2222	Executives
3333	Accounts

14.4.3 Personal account codes

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

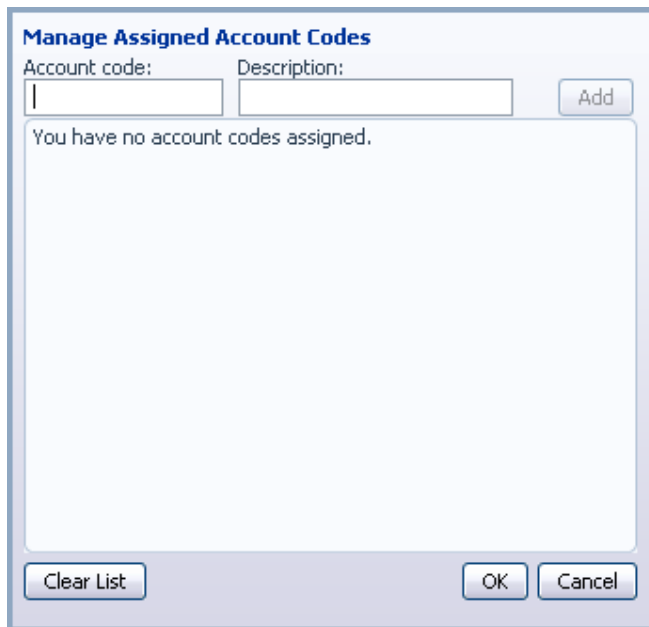
Figure 61: Personal account codes



The screenshot shows a web interface with two tabs: "Personal" (selected) and "Business Group". Below the tabs, a message states: "You have no personal account codes assigned."

To edit your list of valid account codes, click on *Edit Personal Account Codes*.

Figure 62: Editing personal account codes

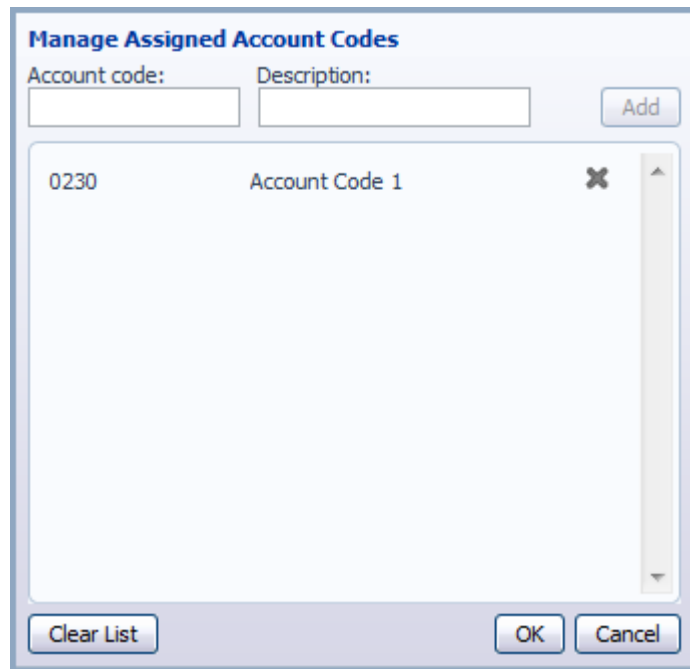


The screenshot shows a dialog box titled "Manage Assigned Account Codes". It contains two input fields: "Account code:" and "Description:". To the right of the "Description:" field is an "Add" button. Below the input fields, a message states: "You have no account codes assigned." At the bottom of the dialog box, there are three buttons: "Clear List", "OK", and "Cancel".

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*.

Figure 63: Adding an account code



To delete an account code, follow these steps:

1. Click on the Cross icon to the right of the account code: ✕
2. Click on *OK*.
3. Click on *Apply*.

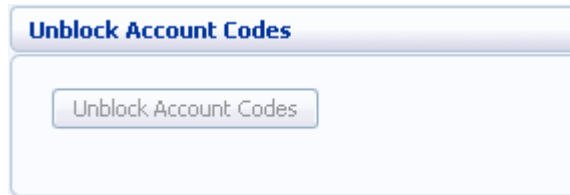
Alternatively, to delete all of your account codes, follow these steps:

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

14.4.4 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 this service, click on *Unblock Account Codes*.

Figure 64: Unblock Account Codes



For more details on Account Codes, see Section 6.4 or speak to your administrator.

14.5 Notifications

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

Figure 65: Settings - Notifications tab

(501) 203 0006 ▾ Call Settings

Dashboard My Mobile Messages & Calls Contacts Call Manager Apps Groups **Settings**

Account Calls Messages Account Codes **Notifications** Reminders Group Mailbox

MWI | Email | Pager | Outdial | Override

Send phone notification of incoming messages to the following phone numbers

Phone Number	All Faxes	Urgent Voicemail	All Voicemail	
(123) 456 7890	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕
(987) 654 3210	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✕
(648) 952 1658	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕
(357) 895 1236	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✕
(785) 412 3698	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✕

Clear List New Entry Apply Cancel

MWI tab

You can use the MWI tab to configure whether your phone should indicate to you when you have new messages.

Figure 66: Messaging Settings – MWI Tab

Phone Number	All Faxes	Urgent Voicemail	All Voicemail	
(123) 456 7890	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕
(987) 654 3210	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✕
(648) 952 1658	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	✕
(357) 895 1236	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✕
(785) 412 3698	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✕

To activate your phone's messages indicator when any new faxes are waiting, follow these steps:

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

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

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

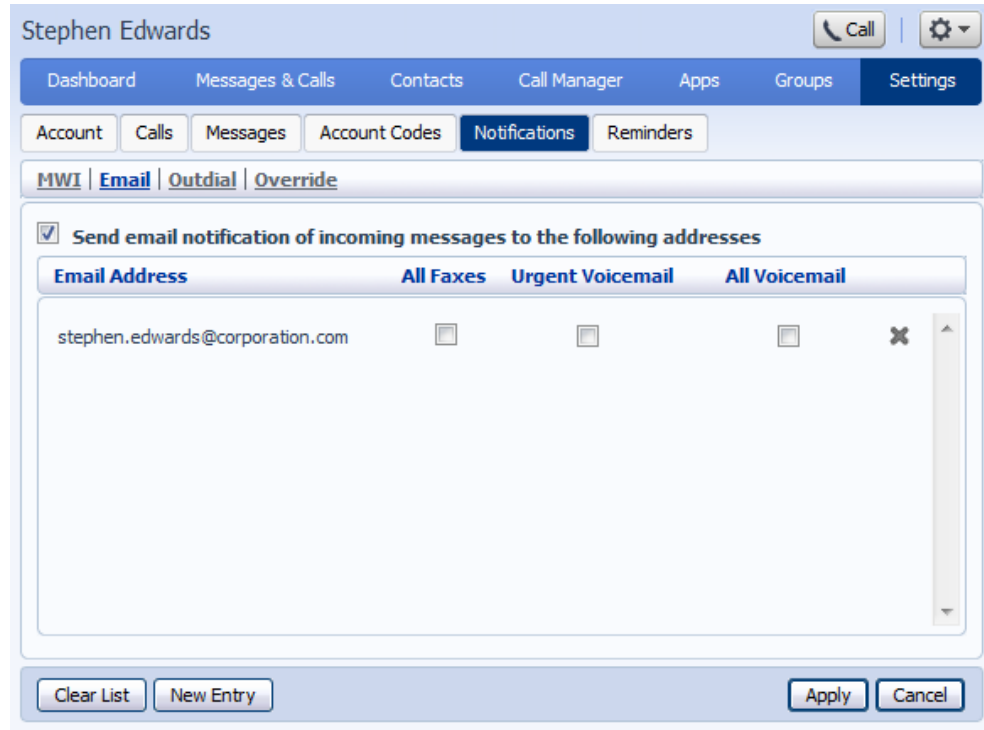
To have only urgent new voice messages activate your phone's messages indicator, follow these steps:

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

Email tab

The Email tab allows you to configure Email notifications, which notify different email accounts when different sorts of messages are waiting.

Figure 67: 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*.

Pager tab

The Pager tab allows you to configure two pagers that will be used to receive new message notifications. These notifications can be sent to any of outdial, numeric, and alphanumeric email pager types.

Figure 68: Pager Notifications

Joanna Price

Call | Settings

Dashboard My Mobile Messages & Calls Contacts Call Manager Apps Groups Settings

Account Calls Messages Account Codes Notifications Reminders Group Mailbox

MWI Email **Pager** Outdial Override

Notify the following pagers of incoming messages, according to the [schedule](#):

Type	Pager Provider/Email	Pager Number	Callback Number	Faxes	Voicemail
	(112) 900 0016	(112) 884 5134		None	All

New Entry Apply Cancel

To add a pager to be notified, follow these steps:

1. Ensure that pager notifications are enabled and that the box on the top left-hand side of the tab is checked.
2. Click on *New Entry*.
3. Enter the pager details requested in the dialog box that appears. You will need to provide the following.
 - The pager gateway type.
 - The provider.
 - The telephone number that people call when sending you a page.
 - The pager number.
 - The PIN for the pager.
4. Check whether you want *All Faxes*, *Urgent Voicemail*, or *All Voicemail* sent to this address.

5. Decide on a retry limit and a delay between retry attempts until the message is marked as read.
6. Click on *Add*.
7. Click on *Apply*.

Once you have added a pager, you can configure a schedule containing periods when pager notifications are sent using the *schedule* link on the top-right hand side of the tab. During inactive periods (for example overnight) any unheard message will still activate the MWI, but the pager notification is postponed until the next active period in the schedule.

To delete a pager from the list, follow these steps:

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

Override tab

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

Figure 69: Notification settings - Override tab

Stephen Edwards

Dashboard Messages & Calls Contacts Call Manager Apps Groups Settings

Account Messages Account Codes Notifications Reminders

MWI | Outdial | **Override**

Override your outdial and pager notifications, sending them according to the [schedule](#):

While the override profile is active, notify me by: **Outdial** Expiry date: 12 27 2012
month day year

Specify the phone number to send outdial notifications to: 1129000005

Choose the incoming messages that should be notified to the specified phone number:

Urgent Voicemail All Voicemail

Set a retry limit and delay between retry attempts until the message is marked as read:

Number of outdial retry attempts: 3 Stop retries when you answer the call

Delay between retries (minutes): 15 Stop retries only when you access your voicemail

Apply Cancel

Using the Override tab, you can

- enable or disable the override profile by clicking the box on the left-hand side of the screen. 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.

14.6 Reminders

The Reminders tab lets you set up reminder calls.

Figure 70: CommPortal Reminders page

(510) 217 5185 ^{HD}

Dashboard Messages & Calls Contacts Call Manager Apps Groups Settings

Account Calls Messages Notifications Reminders

Occurs **Time** **New Reminder**

You have no reminders.

You can configure reminders either to occur once in the next 24 hours, or to repeat daily or weekly.

Occurs:

Time:
Hour Min

14.6.1 Adding reminders

To add a new reminder, you use the New Reminder section:

Figure 71: New Reminder section

New Reminder

You can configure reminders either to occur once in the next 24 hours, or to repeat daily or weekly.

Occurs:

Time:
Hour Min am/pm

To add a new reminder, follow these steps:

Figure 72: Adding a new reminder

New Reminder

You can configure reminders either to occur once in the next 24 hours, or to repeat daily or weekly.

Occurs:

Time:

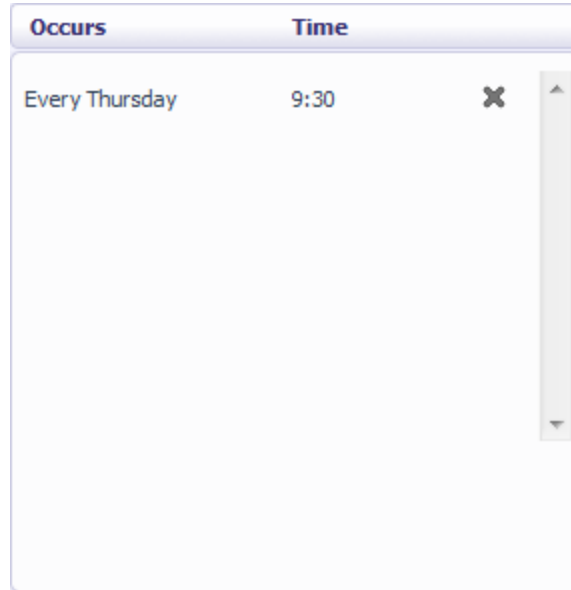
- Once only (next 24 hours)
- Every Monday
- Every Tuesday
- Every Wednesday
- Every Thursday
- Every Friday
- Every Saturday
- Every Sunday
- Every weekday
- Every day

1. Select when you want the reminder call to happen from the dropdown list. You can either choose for it to happen once in the next 24 hours, or for it to happen weekly on a certain day of the week.
2. Enter the time you would like the reminder call using the *Time* boxes and dropdown list.
3. Click on *Add*.
4. Click on *Apply*.

14.6.2 Deleting reminders

To delete a reminder, you use the Reminders list:

Figure 73: Deleting a reminder



To delete a reminder, follow these steps:

1. Click on the cross 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:

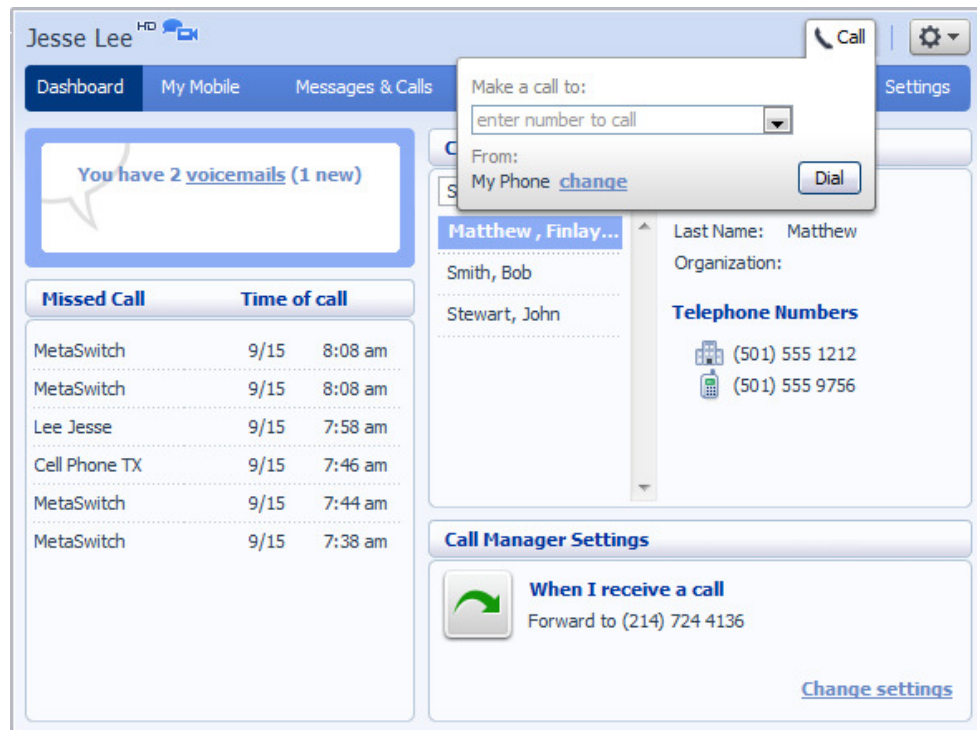
1. Click on *Clear List*.
2. Click on *Apply*.

15 Click To Dial

You can make a phone call from within CommPortal by clicking on the *Call* button at the top of the screen

This pops up a window in which you can enter the number you want to dial:

Figure 74: Click To Dial Window

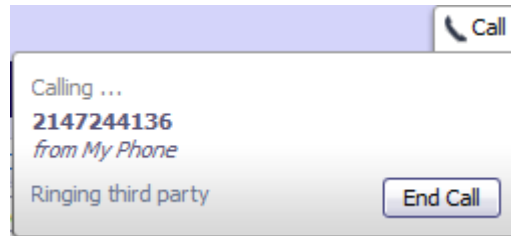


15.1 Calling from your regular phone

To make a call from your regular desk phone, enter the phone number you want to call in the space provided and click *Dial*. Your phone will now ring.

When you answer it the number you entered will be called.

Figure 75: Click To Dial – Call in Progress



Once the person you called has answered this will be displayed on your screen:

Figure 76: Click To Dial – Call Connected



16 Configuring your phone's keys

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

1. Select the *Settings* page in CommPortal.
2. Select the *Account* tab.
3. Under the *Devices* heading, click on the *set keys* link.

This launches a new browser window for the Phone Configurator. You must have Adobe Flash Player version 9 or later installed to use the Phone Configurator.

16.1 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

Figure 77: Modifying a phone profile



The examples shown in this document show a Polycom SoundPoint IP450. 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.

The possible options that you may be able to configure for the keys on your phone are as follows (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 as described in Section 9.1.
- 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 as described in Section 6.7.
- Monitored Extension – allows you to monitor another line as described in Section 9.2.
- 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 in Section 6.5.
- Retrieve Parked Call – this is used to retrieve parked calls as described in Section 6.6.
- 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. Note: Aastra phones only.
- Intercom – this configures the key to launch a paging call as described in Section 9.3.
- 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.
- Group Pickup – this configures the key as a speed dial for the Group Pickup service, described in Section 17.2.2.
- 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, click on Save changes to save your changes. Your phone will pick up the changes you have made overnight. If you want the phone to apply the changes immediately, reboot it, by unplugging it and plugging it back in.

A Access codes

This section lists your phone system's most commonly used access codes:

Table 2: Access codes

Park Call	*13
Retrieve Parked Call	*14
Automatic Recall	*69
Group Call Pickup	*11
Voicemail	*98
MLHG Login	*97
Directed Call Pickup	*12

B Phone Feature Exceptions Matrix between Cisco and Polycom

Table 3: Quick reference information

Feature Name	Not Supported	Custom Supported	Portal Supported
Polycom Phones			
Changing Appearance of Time & Date	X		
Changing Background	X		
Text Messaging	X		
Buddy Lists	X		
Instant messaging	X		
Lync Server	X		
Locking Phone	X		
Logging onto Phone (Hot Desking)	X (VVX500 & IP6000)		
Enabling Headset Memory Mode		X	
Selecting the Correct Headset for Electronic Hook-switch		X	
Browser		X	
Forwarding Calls			X
Managing Contacts (Available on Phone as well)			X
Cisco Phones			
Using Hot Phone	X		
Using a Paired Phone	X		
Using Intercom and Paging	X		
Using Company Directory	X		
Setting & Changing Phone Password	X		
Interactive Voice Response Menu	X		
Connecting to Wireless Voice Network	X		
Changing System Time & Date	X		
Analog Phone with Cisco UC320W	X		
Changing Background	X		
Picking-Up Call From Another Extension		X	
Parking Call		X	
Voicemail Access		X	
Forwarding Calls			X
Configuring Privacy Features			X
Creating and Using Personal Speed Dials			X
Managing Contacts (Available on Phone as well)			X