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</tr>
</tbody>
</table>
1. **MAKING AND ANSWERING CALLS**

1.1 **Internally**

To call another person in your business lift the handset and dial the other person’s extension. This is typically a 3, 4 or 5 digit number, and may begin with #.

Note: 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 **Dial** key once you have dialed the number.

1.2 **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: 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 **Dial** key once you have dialed the number.

1.3 **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: 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 **Dial** key once you have dialed the number.

1.4 **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 **Dial**.

1.5 **Ending Calls**

To end a call replace the handset, or press the **End Call** key.

1.6 **Answering Calls Using the Handset**

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

1.7 **Answering Calls Using the Speaker**

To answer a call using the speakerphone, do not lift the handset and instead press either the **Speaker** or **Answer** key.
2. CALL FORWARDING

2.1 Introduction

Your phone system supports a number of different types of Call Forwarding.

• Immediate (sometimes called Unconditional) Call Forwarding is where all calls are forwarded to a number of your choice. This can either be to your voicemail (which is the default) another extension in your business or an external number.

• Busy Call Forwarding forwards all calls that are received when you are already on the phone.

• No Answer (sometimes called Delay) Call Forwarding forwards all calls when you do not answer them after a certain delay.

• Selective Call Forwarding forwards calls from certain numbers to another number.

The easiest and most flexible way of configuring call forwarding is using CommPortal. See Section 11.2 for instructions on doing this. This section provides instructions on how to set up Call Forwarding using your handset.

2.2 Immediate, Busy and No Answer Call Forwarding using the Handset

2.2.1 Enabling

To use your handset to enable Immediate, Busy or No Answer Call Forwarding dial the access code for the type of call forwarding you want to enable followed by the number you wish to forward calls to.

For example, to use immediate call forwarding to forward all calls to extension 1004, you would dial *721004. Depending on the configuration of your phone system this may set up a courtesy call to the number you are forwarding calls to. The system will only enable call forwarding if this courtesy call is answered.

2.2.2 Disabling

To disable call forwarding dial the disable code for that type of call forwarding.
### 2.2.3 Access Codes

<table>
<thead>
<tr>
<th>Type of forwarding</th>
<th>Enable Code</th>
<th>Disable Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate/Unconditional</td>
<td>*72</td>
<td>*73</td>
</tr>
<tr>
<td>Busy</td>
<td>*90</td>
<td>*91</td>
</tr>
<tr>
<td>No Answer/Delay</td>
<td>*92</td>
<td>*93</td>
</tr>
</tbody>
</table>

### 2.3 Selective Call Forwarding using the Handset

The Selective Call Forwarding feature can be configured by dialing *63. This feature provides voice prompts to help you with setting it up.

### 2.4 Remote Access to Call Forwarding

You phone system also supports setting up Call Forwarding remotely using any phone. To use this feature, follow these steps:

1. Dial the remote access to call forwarding number.
2. Enter your full 10-digit phone number followed by #.
3. Enter your remote access to call forwarding PIN followed by #. Note that this PIN is different from your CommPortal password.
4. Enter the access code of the call forwarding service you wish to configure.
5. If you are enabling call forwarding the system will then provide a broken dialtone. Enter the number you would like calls forwarded to.
3. **ADVANCED CALL HANDLING**

3.1 **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 the call, press the **Resume** key or press the **Hold** key again. If you've made another call since you put the first call on hold, you'll need to put that call or put it on hold before you can retrieve the first one, using the arrow keys to select the call to retrieve.

3.2 **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 depending on your phone type you should 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.

3.3 **Transferring a call**

To transfer a call, follow these steps:

1. Press the **Transfer** key – this places the current call on hold.
2. Dial the number of the person you want to transfer the call to.
3. If you want to transfer the call before the other person answers, press the **Blind** key.
4. Alternatively wait until the person has answered before completing the transfer by pressing the **Xfer** key.

3.4 **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 you call.
3. Once this person has answered press the **Conference** key again to set up the three way call.

3.5 **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. To part a call, follow these steps:
1. Initiate call transfer by pressing the **Transfer** key.
2. Dial the Call Park access code *53.
3. Listen to the park orbit number where the call will be parked.
4. Complete the call transfer by pressing **Transfer** again.

### 3.6 Retrieving a parked call

To retrieve a parked call lift the handset and dial the Call Retrieve access code *54 followed by the park orbit number. For example, to retrieve a call parked on orbit 1, you should dial *541.

### 3.7 Do Not Disturb

If you don’t want any calls to ring your phone, but instead go straight through to your voicemail, you can enable Do Not Disturb.

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

If you don’t have a **DND** key then you can dial *78 to turn Do Not Disturb on, and *79 to turn it off.
4. VOICEMAIL

4.1 Accessing Voicemail

When you have one or more unheard voice messages waiting, your phone will display a flashing light in the upper right corner.

To listen to your messages log in, either by dialing the voicemail access code *318, or press the Messages or Voicemail key if your phone has one.

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

4.2 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>
<thead>
<tr>
<th>Action</th>
<th>Key(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>To listen to your voice messages from the main menu:</td>
<td>Press 1</td>
</tr>
<tr>
<td>To listen to your other messages from the main menu:</td>
<td>Press 1 1</td>
</tr>
<tr>
<td>To save a message once you’ve listened to it:</td>
<td>Press 2</td>
</tr>
<tr>
<td>To delete a message once you’ve listened to it:</td>
<td>Press 3</td>
</tr>
<tr>
<td>To change your mailbox settings from the main menu:</td>
<td>Press 4</td>
</tr>
<tr>
<td>To cancel the current operation:</td>
<td>Press *</td>
</tr>
<tr>
<td>To go back to the previous menu:</td>
<td>Press *</td>
</tr>
<tr>
<td>To finish entering digits, or recording an announcement:</td>
<td>Press #</td>
</tr>
</tbody>
</table>
5. CONFERENCING

The conferencing system allows you to host conference calls with up to 6 participants.

5.1 Moderator Instructions

Give all the conference participants:

- The date and time of the conference call.
- The conference call number.
- The 6 digit participant code.

To start the conference call, follow these steps:

1. Dial the conference call number.
2. Enter your 6 digit moderator code followed by #.
3. If asked, say your name and then press #.

The conference call will now be set up.

When the moderator leaves the call, the conference will end.

5.2 Participant Instructions

To join a conference call, the participant should follow these steps:

1. Dial the conference call number.
2. Enter the 6 digit participant code followed by #.
3. If asked, say their name and then press #.

The participant will then be placed into the conference if the moderator has started it, otherwise they will be put on hold until the conference starts.
5.3 Moderator Commands

The following commands can be dialed from your phone during a conference.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>Allows you to dial another participant to be brought into the conference. After dialing 1 dial the participant’s number followed by #. Once the participant has answered you can press 1 to bring them into the conference, or hit * to drop the call and return to the conference.</td>
</tr>
<tr>
<td><strong>2</strong></td>
<td>Mute or un-mute the moderator.</td>
</tr>
<tr>
<td><strong>3</strong></td>
<td>Lock or unlock the conference. When locked no-one else can joint the conference.</td>
</tr>
<tr>
<td><strong>4</strong></td>
<td>Provide a roll-call of participants.</td>
</tr>
<tr>
<td><strong>5</strong></td>
<td>Provide a count of participants.</td>
</tr>
<tr>
<td><strong>6</strong></td>
<td>Selects whether announcements should be made when participants join and leave.</td>
</tr>
<tr>
<td><strong>7</strong></td>
<td>Announces the name of the last person to join the conference.</td>
</tr>
<tr>
<td><strong>8</strong></td>
<td>Turns conference call recording on or off.</td>
</tr>
<tr>
<td>*****</td>
<td>This command allows the moderator to leave the conference without the call ending. Press 1 to confirm. You may log onto the conference again by following the instructions to start a conference call.</td>
</tr>
</tbody>
</table>

5.4 Moderator Web Access

When moderating a conference you can use the web interface to view and control the conference. To access this, follow these steps:

1. Point a browser at the web conferencing address [https://conf.sp.net/conf](https://conf.sp.net/conf).
2. Enter your moderator and participant code.
3. Select Submit.
6. OTHER PHONE FEATURES

6.1 Speed Dials

You 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, see Section 16.

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 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 in ringing or in progress on that extension, the lamp will be lit solidly.

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 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 unvalidated 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 unvalidated account codes you can enter any code so long as it is the right length. For more on account codes see Section 14.2

6.4 Headset

To make or answer a call using your headset, press the headset key on your phone.
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 point a browser at www.optimumlightpathvoice.com

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

JavaScript must be enabled on your browser.

7.2 Logging In

The following shows a sample CommPortal login page.

To log into CommPortal enter your phone number 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.

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 and fax 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.

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

Dashboard
The dashboard provides a way to quickly access some of your key features.
The dashboard is made up of the following panels:

- Voicemail
- Missed Calls
- Contacts
- Settings

Voicemail
At a glance view of how many new messages you have, and your total number of messages.
Click the View Messages button to jump to the Messages & Calls page to listen to or manage your voicemails.

Missed calls

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 Refresh icon: 🔁.

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 Logout icon: ⚠️.
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:

8.1 Messages

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

You have 1 voicemail (1 new)

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:

<table>
<thead>
<tr>
<th>Missed Call</th>
<th>Time of call</th>
</tr>
</thead>
<tbody>
<tr>
<td>8063225789</td>
<td>3/20 10:51 am</td>
</tr>
</tbody>
</table>

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. Right click on the number of the caller.
2. Select the Dial option.

8.3 Contacts

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

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. Right click on the number of the contact you wish to call.
2. Select the Dial option.

![Contact Example]

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:

![Settings Example]

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:

- **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:

<table>
<thead>
<tr>
<th>From</th>
<th>Time of call</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>8063225780</td>
<td>Wed 3/19 5:48 am</td>
<td>0:00:04</td>
</tr>
<tr>
<td>8063225780</td>
<td>Wed 3/19 4:49 am</td>
<td>0:00:28</td>
</tr>
</tbody>
</table>

9.1.1 Listen To a Message

To listen to a message click on the loudspeaker icon to the left of the message: 🎧. This will pop up a Voicemail player which loads and plays the message.
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, follow these steps:

1. Select the voice message (or messages) to delete by selecting the checkbox to the left of the message:

   ![Messages & Calls](image)

   - Check the box next to the message you want to delete.

2. Click on **Delete**.
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:

1. Select the voice message (or messages) to mark as heard by selecting the checkbox to the left of the message:

2. Click on Mark As Heard.
9.1.4 Marking a Message as New

To mark a message as new, follow these steps:

1. Select the voice message (or messages) to mark as new by selecting the checkbox to the left of the message:

2. Click on Mark As New.
9.1.5 Call Back

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

1. Right click on the number of the caller.
2. Select the Dial option.

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 Add to Contacts icon to the right of the voicemail: 📞.
2. 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.
9.3 Missed

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

<table>
<thead>
<tr>
<th>From</th>
<th>Time of call</th>
</tr>
</thead>
<tbody>
<tr>
<td>709-600-0000</td>
<td>Wed 3/19 1:14 pm</td>
</tr>
<tr>
<td>Berna</td>
<td>Wed 3/19 12:48 pm</td>
</tr>
</tbody>
</table>

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 **Add to Contacts** icon to the right of the call information:
2. 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):

![Dialed Calls Table]

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 **Add to Contacts** icon to the right of the call information:
2. 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:

![Received Calls Table]

9.5.1 Add Number to Contacts

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

1. Click on the **Add to Contacts** icon to the right of the call information:

2. 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:

- **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:

![Contact List Interface](image)

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:

![Searching in Contact List](image)

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:

1. Click on **New Contact**.

2. Enter the details for your new contact in the text boxes provided.
3. 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.

4. Enter any addresses for your contact in the text boxes provided.

5. Hit **Save**.

You new contact will now have been added.
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. Right click on the number of the contact you wish to call.
2. Select the **Dial** option.
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:

1. Click on **New Group**.

2. Enter a name for the group in **Group Name**.

3. Enter an ID for the group in **Telephone ID**.
4. Select any contacts you want to be in the group from the list on the right hand side.

5. Click on **Save**.

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

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

To edit a group, follow these steps:
1. Select the group 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:

![Speed Dials Section](image)

You have no speed dials set up.

![New Speed Dial](image)

**Speed Dial**: 2  
**Number**:  

**Add**

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*. 

![Dashboard](image)
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.

10.2.2 Deleting a Speed Dial

To delete a Speed Dial, follow these steps:

1. Click on the Trash Can 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 all the extensions in your business:

<table>
<thead>
<tr>
<th>Telephone Number</th>
<th>Extension</th>
<th>Name</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>806325787</td>
<td>5787</td>
<td>Anna Arley</td>
<td>None</td>
</tr>
<tr>
<td>806325788</td>
<td>5788</td>
<td>Barrie Bartley</td>
<td>None</td>
</tr>
<tr>
<td>806325789</td>
<td>5789</td>
<td>Chris Carter</td>
<td>None</td>
</tr>
<tr>
<td>806325790</td>
<td>5790</td>
<td>Deano Dickenson</td>
<td>None</td>
</tr>
<tr>
<td>806325791</td>
<td>5791</td>
<td>PLHG Front desk pilot</td>
<td>None</td>
</tr>
<tr>
<td>806325792</td>
<td>5792</td>
<td>Fred Finlay</td>
<td>None</td>
</tr>
<tr>
<td>806325793</td>
<td>5793</td>
<td>Gill Grton</td>
<td>None</td>
</tr>
<tr>
<td>806325794</td>
<td>5794</td>
<td>Harry Henryson</td>
<td>None</td>
</tr>
<tr>
<td>806325795</td>
<td>5795</td>
<td>Ivan Ivanovich</td>
<td>None</td>
</tr>
</tbody>
</table>

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

1. Right click on the number of the extension you wish to call.
2. Select the Dial option.

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:

<table>
<thead>
<tr>
<th>Short Code</th>
<th>Telephone Number or Internal Code</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>6001 - 6005</td>
<td>7034800501 - 7034800505</td>
<td>None</td>
</tr>
<tr>
<td>6006</td>
<td>5107485384</td>
<td>None</td>
</tr>
</tbody>
</table>

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

The Call Manager page is where you configure your incoming call services. It consists of a series of tabs which you can select:

The Call Manager page has the following sections:

- **Summary** gives you a description of what will happen to incoming calls.
- **Forwarding** 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.
11.1 Summary

The summary provides you with a description of how your incoming calls will be handled:

In the example above, the Summary page is telling us four things:

1. Firstly that all calls will ring our phone. This is because we don’t have Immediate Call Forwarding enabled. If we did, no calls would ring our phone.

2. That when busy, calls will be forwarded to our voicemail. Alternatively, if we used Busy Call Forwarding to forward calls elsewhere it would say so here.

3. When calls aren’t answered they will also be forwarded to our voicemail. Alternatively, we could use No Answer Call Forwarding to forward calls elsewhere this would say so.

4. Calls from (806)322-5789 will ring using a special ringtone. This is because we have priority calling set up from this number.

(Instructions on setting up each of the above services follow in this section.)

Whenever you change one of the settings within the Call Manager page, this description will update, so you can refer to it for an easy to understand description of what will happen to your incoming calls.
11.2 Forwarding

The **Forwarding** tab allows you to view and change your Call Forwarding settings. It consists of a number of sections:

- **Immediately** covers immediate (also known as Unconditional) Call Forwarding.
- **Busy/No Answer** covers Busy and No Answer (also known as Delayed) Call Forwarding.
- **Selected Callers** covers Selective Call Forwarding which only applies to calls from certain numbers.
- **Forwarding Destinations** allows you to define names for the numbers you want to forward your calls to, allowing you to quickly and easily select destinations.
11.2.1 Forwarding Destinations

Forwarding Destinations allows you to give names to the numbers you want to forward your calls to, allowing you to quickly and easily select destinations when setting up Call Forwarding:

Your forwarding destinations are shown down the left hand side of the screen:

Adding a Destination

To add a Forwarding Destination, follow these steps:

- Enter a name for the destination in the Destination text box.
- Enter the number for the destination in the Number box.
• Click on Add.

• Click on Apply.

**Deleting a Forwarding Destination**

To delete a Forwarding Destination, follow these steps:

1. Click on the **Trash Can** icon to the right of the forwarding destination: 🗑.
2. Click on **Apply**.

Alternatively, to delete all of your Forwarding Destinations, follow these steps:

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

**11.2.2 Immediately**

This section allows you to control your Immediate (also known as Unconditional) Call Forwarding.

**Enabling Forwarding**

To set up call forwarding, follow these steps:

1. Select the destination you want to forward the call to from the drop-down list. Alternatively, select **Other** and enter the number to forward calls to.
2. Click on the red cross: ✗ so that it becomes a green tick: ✓.

3. Click Apply.

The phone system will store the last destination you forward calls to so you can enable call forwarding to that number by following these steps:

1. Click on the red cross: ✗ so that it becomes a green tick: ✓.

2. Click Apply.

**Disabling Forwarding**

To disable call forwarding, follow these steps:

1. Click on the green tick: ✓ so that it becomes a red cross: ✗.

2. Click Apply.

### 11.2.3 Busy/No Answer

This section allows you to configure your Busy and No Answer (sometimes called Delayed) Call Forwarding services:
Configuring Busy/No Answer Together or Separately

By default the system assumes that you will want to set up Busy and No Answer Call Forwarding to the same number. To change this so that you can set them up separately, follow these steps:

1. Uncheck the **Use same call forwarding configuration for both services** checkbox.
2. Click on **Apply**.

Enabling Busy or No Answer Call Forwarding

To enable Busy or No Answer Call Forwarding, follow these steps:

1. In the section for Busy or No Answer call forwarding, select the destination you want to forward calls to, or select **Other** and enter a number.
2. For No Answer Call Forwarding you can change the delay after which calls will be forwarded by entering a new value in the **Forward unanswered calls after X seconds** text box. (The default is 36 seconds.)
3. Click on the red cross: 
4. Click on **Apply**.
The phone system will store the last destination you forwarded calls to so you can enable call forwarding to that number by following these steps:

1. Click on the red cross: ✗ so that it becomes a green tick: ✓.
2. Click Apply.

**Enabling Busy or No Answer Call Forwarding**

To disable Busy or No Answer Call Forwarding, follow these steps:

1. In the Busy or No Answer Call Forwarding section click on the green tick: ✓ so that it becomes a red cross: ✗.
2. Click on Apply.

**11.2.4 Selected Callers**

This section allows you to configure Selective Call Forwarding, which only applies call forwarding to calls from certain numbers.
Setting up List of Numbers to Forward

To set up your list of numbers of callers who will be forwarded, follow these steps:

1. Click on **Edit List**. The following pop-up window appears:
   
   ![Edit List Pop-up Window]

   To add a number, enter it in the **List** tab, click on **Add new** and then click on **OK**

2. To add a number, enter it in the **List** tab, click on **Add new** and then click on **OK**

   ![Add Number Pop-up Window]

3. To add a contact, select it from the **Contacts** list and click on **OK**.

![Selective Call Forwarding Screening List](image)

4. Delete a number by clicking on the **Trash Can** icon to the right of the number in the list: 🚭 and then click on **OK**.

5. To delete a contact from the list uncheck the contact in the **Contacts** list and click on **OK**.

![Call Manager](image)

6. Click on **Apply**.
**Enabling Call Forwarding**

To enable Selective Call Forwarding, follow these steps:

1. Add one or more numbers to forward calls from as described in the previous section.
2. Select the destination you want to forward calls to from the drop down list, or select **Other** and enter a number.
3. Click on the red cross: ✗ so that it becomes a green tick: ✓.
4. Click **Apply**.

The phone system will store the last destination you forward calls to so you can enable call forwarding to that number by following these steps:

1. Click on the red cross: ✗ so that it becomes a green tick: ✓.
2. Click **Apply**.

**Disabling Call Forwarding**

To disable Busy or No Answer Call Forwarding, follow these steps:

1. Click on the green tick: ✓ so that it becomes a red cross: ✗.
2. Click on **Apply**.
11.3 Follow Me

The **Follow Me** section lets you view and set up an advanced Find Me Follow Me service, where calls can be forwarded to multiple different destinations in a sequence:

A Follow Me rule set can have up to 6 steps which our phone system will perform one after the other. As part of each step you can specify one or more phone numbers to ring – and you can specify that each phone number will be ring for a different period of time.

For example, you may wish to set up your Follow Me rule set as follows:

- **Step 1**: Ring your regular phone for 20 seconds and ring your secretary’s phone for the first 10 seconds of this.
- **Step 2**: Ring your home phone for 10 seconds.
- **Step 3**: Ring your work cell phone and your personal cell phone for 30s.
This rule set will be displayed in Follow Me as shown:

![Follow Me Rule Set](image)

What will then happen when a call comes into your number is as follows:

1. For the first 10s your regular phone and your secretary’s phone will be rung.
2. For the next 10s just your regular phone will be rung.
3. For the next 10s your home phone will.
4. Next both of your cell phones will ring for 30s.
5. Finally the call will be sent to Voicemail.

**Enabling and Disabling Follow Me**

Once you have set up your Follow Me rules you should enable it. To do this, follow these steps:

1. Click on the red cross: ❌ so that it becomes a green tick: ✅.
2. Click **Apply**.

To disable Follow Me, follow these steps:

1. Click on the green tick: ✅ so that it becomes a red cross: ❌.
2. Click **Apply**.
Adding Rules

To add a Follow Me rule, follow these steps:

1. Click on **Add Rule**. A pop-up window will appear:

2. Select the Forwarding Destination you want to ring, or select **Other** and enter the number in the **Telephone Number** box.

3. Enter the number of seconds you want this phone to ring in the box provided.

4. Select which step this number should be called at from the dropdown list.

5. Choose whether that number is permitted to forward the call on to anywhere else itself.

6. Optionally enter a description for this rule in the **Description** text box.

7. Click on **OK**.

8. Click on **Apply**.
**Changing Rules**

To change an existing rule, follow these steps:

1. Click on the rule. Select **Edit this rule** from the pop-up:

   ![Call Manager Interface]

2. Modify any settings for this rule in the pop-up window:

   ![Edit Rule Pop-up]

3. Click on **OK**.

4. Click on **Apply**.
Deleting a Rule

To delete a rule, follow these steps:

1. Click on the rule. Select **Delete this rule** from the pop-up:

   ![Delete Rule](image)

2. Click on **Apply**.

Alternatively to delete all of your rules, follow these steps:

1. Click on **Clear List**.

2. Click on **Apply**.

11.4 Screening

The **Screening** page allows you to view and change your Call Screening settings. It consists of a number of sections:

- **Selective Rejection** allows you to reject calls from certain numbers.
- **Anonymous Rejection** allows you to reject all calls from anonymous numbers.
- **Priority Call** lets you set up special ringtones when certain numbers call you.
11.4.1 Selective Rejection

The **Selective Rejection** section lets you configure which numbers you want to reject calls from:

![Selective Rejection Section](image)

**Enabling and Disabling Selective Rejection**

To enable Selective Rejection, follow these steps:

1. Click on the red cross: ✗ so that it becomes a green tick: ✓.
2. Click **Apply**.

To disable Selective Rejection, follow these steps:

1. Click on the green tick: ✓ so that it becomes a red cross: ✗.
2. Click **Apply**.
Changing Selective Rejection Numbers

To change your selective call rejection number list, follow these steps:

1. Click on **Edit List**.

2. To add a number enter it in the **List** tab, click on Add new and then click on **OK**.

3. To add a contact, select it from the **Contacts** list and click on **OK**.
4. Delete a number by clicking on the **Trash Can** icon to the right of the number in the list: 🗑️ and click on **OK**.

5. To delete a contact from the list, uncheck the contact in the Contacts list and click on **OK**.

6. Click on **Apply**.

**11.4.2 Anonymous Rejection**

The **Anonymous Rejection** section lets you configure whether anonymous callers will be rejected or not:

To enable Anonymous Rejection, follow these steps:

1. Click on the red cross: ❌ so that it becomes a green tick: ✅.
2. Click **Apply**.

To disable Anonymous Rejection, follow these steps:

1. Click on the green tick: ✅ so that it becomes a red cross: ❌.
2. Click **Apply**.
11.4.3 Priority Call

The **Priority Call** section lets you configure calls from certain number to ring your phone with a special ringtone:

---

**Enabling and Disabling Priority Call**

To enable Priority Call, follow these steps:

1. Click on the red cross: ✗ so that it becomes a green tick: ✓.
2. Click **Apply**.

To disable Priority Call, follow these steps:

1. Click the green tick: ✓ so that it becomes a red cross: ✗.
2. Click **Apply**.
Changing Priority Call Numbers

To change your Priority Call number list, follow these steps:

1. Click on **Edit List**.

2. To add a number enter it in the **List** tab, click on **Add new** and then click on **OK**.

3. To add a contact, select it from the **Contacts** list and click on **OK**.
4. Delete a number by clicking on the **Trash Can** icon to the right of the number in the list: ⚁ and click on **OK**.

5. To delete a contact from the list, uncheck the contact in the **Contacts** list and click on **OK**.

6. Click on **Apply**.
12. REMINDERS

The Reminders page lets you set up reminder calls:

12.1 Adding Reminders

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

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.

12.2 Deleting Reminders

To delete a reminder, you use the Reminders list:
To delete a reminder, follow these steps:

1. Click on the **Trash Can** icon to the right of the reminder in the list:ė
2. Click on **Apply**.

Alternatively to delete all of your reminder calls, follow these steps:

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

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

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 up calls that are ringing on any other lines in that group by picking up your phone and calling the Group Call Pickup code.

- **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 then there will be an entry in the **Group Membership** section for it called **MLHG ...**. Click on this entry to view that Multi Line Hunt Group:

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.
- The lines which are in this group and whether each line is currently logged in. Your line will be in this list.

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: *321 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: *322.

**Using CommPortal**

To log into the Multi Line Hunt Group using CommPortal click on **Login**. Your line will be marked in the list with: *露天。

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

**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:
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 the call for another phone in your Call Pickup Group, follow these steps:

1. Pick up your phone handset.
2. Dial the Call Pickup access Code: *311.

13.3 Multiple Appearance Directory Numbers

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

![Multiple Appearance Directory Number screenshot]

The following information is shown:

- What department this Multiple Appearance Directory Number is in, if any. If your business does not use departments then this will say None.
- How many lines are in the group.
- The lines which are in this group. Your line will be in this list.
Only an administrator can make changes to a Multiple Appearance Directory Number group.
14. SETTINGS

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

- **Security** lets you change your passwords and PINs.
- **Account Codes** lets you set up your account codes, if you have appropriate permissions.
- **Blocking** lets you set up blocking for different types of outgoing calls.
- **Preferences** lets you configure a number of properties which apply to your phone calls.
- **Messaging** allows you to configure your voice mailbox.
- **Phones** lets you configure your phone’s keys, if you have a compatible phone model.
- **Toolbar** lets you install the CommAssistant Toolbar which provides quick easy access to your CommPortal settings on your PC.
14.1 Security

The Security tab lets you set up the security options for your phone account.

14.1.1 Changing Your CommPortal Password

The Change Password section lets you change your CommPortal password:

To change your CommPortal password, follow these steps:

1. Enter your new password in the Password text box.
2. Enter your new password in the Confirm password text box.
3. Click on Change Password.

14.1.2 Unblocking Remote Access to Call Forwarding

If you make too many unsuccessful attempts to access Remote Access to Call Forwarding using an incorrect PIN, the service will be blocked. To unblock this service, click on Unblock Forwarding.
14.1.3 Changing your PINs

You have two different PINs.

1. Your Call Services PIN, which you use to access Remote Access to Call Forwarding.
2. Your Voicemail PIN, which you use to access your Voicemail.

To change either of these PINs, follow these steps:

1. Enter the new PIN in either the **Call Services PIN** or **Voicemail PIN** text box.
2. Click on **Change** to the right of your new PIN.

![Change PIN](image)

14.1.4 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**.

![Unblock Account Codes](image)

For more details on Account Codes, see **Sections 6.3 and 14.2** or speak to your administrator.
14.2 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.

For more details on the Account Codes services, see *Section 6.3* or speak to your administrator.
14.2.1 Account Code Options

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

- **Call types requiring an account code** show you the types of calls which will require you to enter a code once you have dialed the number. In the example above, account codes are only required for International calls.

- **Use validated account codes** specifies whether your system uses validated or unvalidated 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.
14.2.2 Business Account Codes

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

```
<table>
<thead>
<tr>
<th>Personal</th>
<th>Business Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>2222</td>
<td>Executives</td>
</tr>
<tr>
<td>3333</td>
<td>Accounts</td>
</tr>
</tbody>
</table>
```

14.2.3 Personal Account Codes

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

```
<table>
<thead>
<tr>
<th>Personal</th>
<th>Business Group</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>You have no personal account codes assigned.</td>
</tr>
</tbody>
</table>
```
To edit your list of valid account codes, click on **Edit Personal Account Codes**.

![Manage Assigned Account Codes](image)

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 **Description** text box.
3. Click on **Add**.
4. Click on **OK**.
5. Click on **Apply**.

![Manage Assigned Account Codes](image)

To delete an account code, follow these steps:
1. Click on the **Trash Can** 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**.

### 14.3 Blocking

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

To block certain types of call, follow these steps:
1. Check the type of call you want to block.
2. Hit **Apply**.

To unblock a type of call, follow these steps:
1. Uncheck the type of call you want to allow.
2. Click on **Apply**.
14.4 Preferences

The Preferences tab lets you view and change some general settings for your phone line which you are unlikely to want to change often.

14.4.1 Forwarding Preferences

The Forwarding Preferences section 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:

1. 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.

2. Click on Apply.
14.4.2 Line Information

The **Line Information** section shows you information about your line:

<table>
<thead>
<tr>
<th>Line Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line name:</td>
</tr>
<tr>
<td>Member of Department:</td>
</tr>
<tr>
<td>Admin for Department:</td>
</tr>
</tbody>
</table>

- **Line name** shows the name this line is configured as. Your administrator can change this if it is incorrect.

- **Member of Departments** 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 for Department** shows if you are an administrator, and if so, for which department.

14.4.3 Voicemail Preferences

The **Voicemail Preferences** section lets you configure how quickly calls should forward to voicemail if you don’t answer:

<table>
<thead>
<tr>
<th>Voicemail Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incoming calls are forwarded to voicemail after 10 seconds.</td>
</tr>
</tbody>
</table>

To change the time after which calls should forward to voicemail, follow these steps:

1. Enter a new value in the text box.
2. Click on **Apply**.

14.4.4 Click To Dial

The **Click To Dial** section lets you configure settings for your **Click To Dial** service:

<table>
<thead>
<tr>
<th>Click To Dial</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use my subscriber line</td>
</tr>
<tr>
<td>Use remote telephone 5555551111</td>
</tr>
<tr>
<td>Answer my telephone automatically when used to place click to dial calls</td>
</tr>
</tbody>
</table>

For more information on using Click To Dial, see *Section 15.*

If you want to use your regular phone for your calls using Click To Dial, follow these steps:
1. Select **Use my subscriber line**.
2. Click on **Apply**.

To use another phone as the phone for your calls using Click To Dial, follow these steps:

1. Select **Use remote telephone**.
2. Enter the number of the phone line you want to use in the text box.
3. Click on **Apply**.

When using your regular phone for your calls using Click To Dial, if you want this phone to automatically answer, follow these steps:

1. Check the **Answer my telephone automatically when used to place click to dials calls**.
2. Click on **Apply**.

### 14.4.5 Caller ID Preferences

The **Caller ID Preferences** section lets you configure your caller ID service.

<table>
<thead>
<tr>
<th>Caller ID Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Withhold my caller ID when making calls</td>
</tr>
<tr>
<td>Display incoming call name on my phone</td>
</tr>
<tr>
<td>Display incoming call number on my phone</td>
</tr>
</tbody>
</table>

To withhold your caller ID when making calls, follow these steps:

1. Select **Withhold my caller ID when making calls**.
2. Click on **Apply**.

To display the name of a caller when your phone rings, follow these steps:

1. Select **Display incoming call name on my phone**.
2. Click on **Apply**.

To display the number of a caller when your phone rings, follow these steps:

1. Select **Display incoming call number on my phone**.
2. Click on **Apply**.

Note that not all models of phone will display the caller’s name and number.
14.5 Messaging

The **Messaging** tab lets you change the operation of your Voice and Fax messaging service, and has a series of sections:

- **Settings** lets you configure some general Messaging settings.
- **Mailbox** lets you configure your Voice mailbox.
- **MWI Notification** lets you configure whether your phone notifies you when you have messages waiting.
- **Email Notification** lets you configure whether you are alerted via email when messages arrive.
14.5.1 Settings

Time zone

To change the time zone that you are in, follow these steps:

1. Select the new time zone from the drop down list in the **Subscriber Timezone** section.
2. Click on **Apply**.

Voice and Fax Forwarding

This section lets you enter an email address to which all your voice and fax messages should be sent when they are left in your mailbox:

To set up forwarding of your messages to your email, follow these steps:

1. Check **Auto-forward all voicemail messages and faxes to this email address**.
2. Enter your email address in the text box.
3. If you want to also leave a copy of the message in your mailbox (so you can view them in CommPortal), check **Leave a copy of forwarded voicemail messages and faxes in the inbox**.
4. Click on **Apply**.
14.5.2 Mailbox

The **Mailbox** section lets you configure your mailbox settings:

![Mailbox Settings Interface]

**Greetings**

To configure a greeting which should be played during business hours, follow these steps:

1. Select the greeting you have recorded from the drop-down list.
2. Click on the **business hours** link:
3. Define your business’s hours of operation, by selecting the days you operate, and the times you operate between. Then click on OK.

4. Click on Save Settings.

**Mailbox Settings**

To configure your mailbox so that it does not require you to enter a PIN when you collect your messages, follow these steps:

1. Check **Skip PIN**.
2. Click on **Save Settings**.

To disable the **Skip PIN** setting, follow these steps:

1. Uncheck **Skip PIN**.
2. Click on **Save Settings**.

To configure your mailbox so that it logs you directly into your mailbox when you collect your messages, follow these steps:

1. Check **Fast Login**.
2. Click on **Save Settings**.

To disable the fast login feature of your mailbox, follow these steps:

1. Uncheck **Fast Login**.
2. Click on **Save Settings**.

To configure your mailbox so that it automatically plays your new messages when you’ve logged in, follow these steps:

1. Check **Auto-Play**.
2. Click on **Save Settings**.

To disable the auto play feature of your mailbox, follow these steps:

1. Uncheck **Auto-Play**.
2. Click on **Save Settings**.

**Live Message Screening**

Live Message Screening lets you listen to callers who are leaving voice messages while they are doing so. If you have Live Message Screening enabled, your phone will ring with a distinctive ringtone when someone is leaving you a message. If you answer your phone you will be able to hear the caller leaving the message.

To enable Live Message Screening, follow these steps:

1. Check **Enable live message screening**.
2. Click on **Save Settings**.

To disable Live Message Screening, follow these steps:

1. Uncheck **Enable live message screening**.
2. Click on **Save Settings**.
14.5.3 MWI Notification

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

To have your phone’s messages light lit when any new faxes are waiting, follow these steps:

1. Check All Faxes.
2. If there is a red cross on the screen: ✗ click it so that it becomes a green tick: ✔.
3. Click on Apply.

To have all new voice messages light your phone’s messages light, follow these steps:

1. Check All Voicemail.
2. If there is a red cross on the screen: ✗ click it so that it becomes a green tick: ✔.
3. Click on Apply.

To have only urgent new voice messages light your phone’s messages light, follow these steps:

1. Check Urgent Voicemail.
2. If there is a red cross on the screen: ✗ click it so that it becomes a green tick: ✔.
3. Click on Apply.
14.5.4 Email Notification

The email notification lets you notify different email accounts when different sorts of messages are waiting. This will override any settings you have in the Settings section, described in Section 14.5.1.

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. If there is a red cross on the screen: ✗ click it so that it becomes a green tick: ✔.
6. Click on Apply.

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

1. Click on the Trash Can 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 the **Clear List**.
2. Click on **Apply**.

### 14.6 Phones

The **Phones** section allows you to modify your phones settings, for example by adding speed dials.

To modify your phone’s settings click on **Configure your phone**. This will launch a new browser window for the Phone Configurator. See *Section 16* for instructions on using this.
14.7 **Toolbar**

The **Toolbar** section allows you to download the CommAssistant toolbar to install on your Microsoft Windows PC. This gives you fast access to the commonly used phone settings from your desktop, along with Click To Dial.

To download and install the CommAssistant toolbar, follow these steps:

1. Click on the **download the toolbar installer** link.
2. If prompted, select **Run** to start the installation.
3. Follow the on-screen instructions to install CommAssistant.

For instructions on using CommAssistant, see the Help provided with it.
15. **CLICK TO DIAL**

You can make a phone call from within CommPortal by clicking on the **Click To Dial** icon.

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

![Click To Dial Icon](image1)

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.

![Calling Notification](image2)

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

![Calling Notification](image3)
Once the person you called has answered this will be displayed on your screen:

15.2 Calling from Another Number

Click To Dial also allows you to make calls, from any phone with a direct dial number, so that they appear to come from your business line. This could be your cell phone, a payphone, or your home number.

Once you select a Click To Dial call, select **Configure**.

This takes you to the **Preferences** section of the **Settings** page. Under **Click To Dial** select **Use remote telephone** and enter the number of the phone you want to use to make your call.

If you have a remote telephone number configured the Click To Dial icon changes to: 📞.

You can now place a Click To Dial call. This will cause the number you entered as the remote telephone to ring. When you answer this phone your Click To Dial call will be set up.
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 **Phones** tab.
3. Click on the **Configure Your Phone** 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’s Graphical View

Once you have launched the Phone Configurator you will be presented with an image of your phone:

The examples shown in this document show a Cisco 508 phone with a sidecar. Your phone model may differ from the one shown.

If you have a phone with one or more sidecars, you can zoom in on the phone, or a sidecar, by hovering your mouse pointer over it:
You can see whether you can modify a key by hovering your mouse over the key. If the key glows blue you can configure it. If it glows red, you cannot.

To select a key, click on it. This will launch a pop-up allowing you to configure the key:

Use the drop-down list to select the operation you’d like that key to perform:
The possible options are as follows (although not all of these options may be enabled on your phone system):

- **Nothing** – 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 6.1.
  - Enter the number you want this Speed Dial to call in the box provided.

- **Monitored Extension** – allows you to monitor another line as described in Section 6.2.
  - Enter the number of the extension you want to monitor in the box provided.

Whichever option you chose for your key you may enter a label for the key. If your phone has a display next to the key you configured this label will be shown on the phone display.

Once you have finished configuring your key click on **OK**. The picture of the phone will be updated with the label you gave your new key assignment.

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.

### 16.2 Table View

There is a more advanced and powerful interface for configuring your phone, which can be accessed by clicking on the **Table View** icon at the bottom right of the screen:

This view is normally used by the administrator to make changes to the behavior of your phone, but you can use it to make changes to your advanced settings. For more detail on doing this speak to your administrator, or see the MetaSwitch Hosted IP PBX Administrator Guide.
17. **ACCESS CODES**

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

<table>
<thead>
<tr>
<th>Access Code</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Call Forwarding Activation</td>
<td>*72 + number to forward to</td>
</tr>
<tr>
<td>Immediate Call Forwarding Deactivation</td>
<td>*73</td>
</tr>
<tr>
<td>Busy Call Forwarding Activation</td>
<td>*90</td>
</tr>
<tr>
<td>Busy Call Forwarding Deactivation</td>
<td>*91 + number to forward to</td>
</tr>
<tr>
<td>No Answer Call Forwarding Activation</td>
<td>*92</td>
</tr>
<tr>
<td>No Answer Call Forwarding Deactivation</td>
<td>*93 + number to forward to</td>
</tr>
<tr>
<td>Park Call</td>
<td>*53</td>
</tr>
<tr>
<td>Retrieve Parked Call</td>
<td>*54</td>
</tr>
<tr>
<td>Do Not Disturb Activation</td>
<td>*78</td>
</tr>
<tr>
<td>Do Not Disturb Deactivation</td>
<td>*79</td>
</tr>
<tr>
<td>Automatic Recall</td>
<td>*69</td>
</tr>
<tr>
<td>Group Call Pickup</td>
<td>*311</td>
</tr>
<tr>
<td>Voicemail</td>
<td>*318</td>
</tr>
</tbody>
</table>