

Metaswitch Networks

Hosted PBX End User Guide

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metaswitch

Notices

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1 Using this Manual

When deploying Hosted PBX and IP Centrex products Service Providers will often need to provide materials to allow the SMB to train its employees in the use of the phone system. Metaswitch provides a set of sample end-user manuals to Service Providers who wish to deploy the Metaswitch SMB Solution's Hosted PBX application.

This document is the sample End User Guide and it is intended to be made available to all phone users at an SMB which has received a Hosted PBX or IP Centrex based product. Its goal is to provide enough information for end users to be able to perform all tasks and use all of the features associated with their phone system.

If Metaswitch customers offering Hosted PBX and IP Centrex products wish to use this document as a basis for an End User Guide then they should do the following:

- Modify the page size of this document if appropriate to make it into suitable dimensions for publishing.
- Brand this document with their own color schemes, logos and fonts.
- Correct the values of any access codes in accordance with the Service Provider's configuration. Example access codes are included throughout this manual in the format *72, and are summarized in Appendix A.
- Modify any end user self care URLs to the correct values.
 - <https://hosted.sp.net/> is given in this document as the URL end users should use to access CommPortal.
- Modify the values of any phones numbers to the correct values.
 - 555-555-9000 is given in this document as the Conferencing system telephone number.
 - 555-555-8000 is given in this document as the Remote Access to Call Forwarding telephone number.
- Configure the substitutable fields. This document includes substitutable fields where you can easily substitute customer-specific values, for example the name of the telephone service that the customer will be using. Use the instructions provided in Configure the substitutable fields to enter the values you want to display in the substitutable fields. In particular, you may need to replace 'Metaswitch Networks' with the customer name and 'Hosted PBX' with the name of the telephone service.

You may also wish to make further changes to amend the content of this manual.

- This document includes example instructions for Aastra, Cisco, Polycom and snom phones. If you are offering other phone models, you may wish to include similar instructions for those phone models.
- There are two different versions of the Phone Configurator, depending on whether the phone is provisioned using the built-in method or using an Endpoint Pack. You should delete the section that does not apply.
- This document may cover some features not offered by the Service Provider, or the Service Provider may decide that it is inappropriate to describe some of the features in this document. In this case any description of these features should be removed. In particular, features such as Easy Call Manager, Incoming Call Manager, Click to Dial and the Phone Configurator are only available using MetaSphere EAS.
- This document uses the new CommPortal UI available from MetaSphere EAS V9.3.20. If you are continuing to use the original CommPortal UI, you should use an earlier version of this document.
- The Service Provider may wish to add sections to this document to cover other advanced features depending on their target market and service offerings.

1.1 Branding this document

This document is provided with a number of substitutable Document Property fields that you can easily amend to display values specific to a customer so that their administrators and end-users can get started immediately.

You can also replace fonts, logos and screenshots, and change the page size and layout of the manual if you wish.

1.1.1 Defining the substitutable values

If you turn on field shading, you can then see where the substitutable fields occur in the manual. This may help you decide how you want to replace them.

To turn on field shading,

- Click the Word *Start* button.
- Select *Word options*.
- Select *Advanced*.
- Scroll down and find the *Show document content* section.
- Use the drop-down alongside *Field Shading* to select *Always*.

The following table lists all the substitutable fields which have been inserted in the document, and their default values.

You may find it helpful enter the values that you will use in your end-user manual in the column provided.

Label	Default Value	Your Value
Title	Hosted PBX End User Guide	
Release / Issue	Metaswitch Release / Issue Number	
Date	Date	
Company Name	Metaswitch Networks	
Product Name 1	Hosted PBX	
Product Name 2	CommPortal	
Product Name 3	Integrated ACD	
Header1	Title	
Header2	Document Version Number	
Footer1	Page Number	
Footer2	Section Title	

1.1.2 Configure the substitutable fields


You should now follow these steps to enter these values in this manual.

1. Access the document's Custom Properties list.

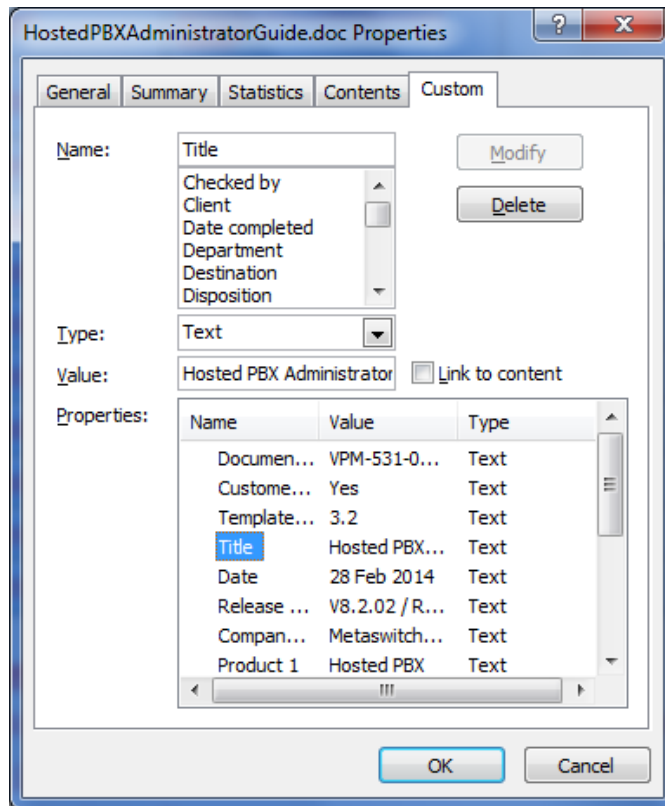
For Word 2010 or later:

- (a) Click the **File** tab.
- (b) Ensure the **Info** pane is displayed.
- (c) Use the drop down arrow alongside *Properties* to select *Advanced Properties*.

For Word 2007:

- (a) Click the Word Start button .
- (b) Select *Prepare*.
- (c) Select *Properties*.
- (d) Use the drop down arrow alongside *Document Properties* to select *Advanced Properties*.

2. Select the **Custom** tab.



3. In the Properties box, highlight the property that you want to modify.
4. The name of the Property will then appear in the Name box.
5. In the Value box, replace the default value with the value that you want to use.
6. The Modify button will then be enabled. Click Modify to apply the change.
7. Repeat for all the properties that you want to change.

1.1.3 Replace logos and screenshots

You should work through the document to replace any logos and screenshots that will be different in your customer's deployment.

1.1.4 Prepare the document for publication

You should now prepare the document for your customer and their end-users.

- Delete this opening chapter
- Rebuild the Table of Contents.
 - Press **Ctrl-A** to select the whole document.
 - Press **F9**.

- Select *Update entire table* and press **OK**.
- Select *Print -> Print Preview* to force the headers and footers to update.
- Browse through the document to check for any errors. All the substitutable fields should now be showing the values you entered in 1.1.2.

2 Introduction

Welcome to your new phone!

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

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

- Chapters 3 to 9 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
 - setting up call forwarding using your handset
 - 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 desk phone as soon as possible.

You may also have a mobile phone number that is associated with your main telephone number so that incoming calls ring both on your desk phone and on your mobile device, and calls made on your mobile device use the same call services as your desk phone. However, this guide only describes how to use your desk phone.

- Chapters 10 to 20 describe the more advanced functions and features of your phone system, including using the online CommPortal interface 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 Metaswitch Networks phone system then please contact your administrator.

3 Making calls

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

If you dial someone within your business, your telephone system may be configured to show you the name of the person you are calling once their line starts ringing so that you can check you have dialed the right number.

3.2 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. For example, you may need to hit the **OK** or **Confirm** key (snom phones) or the **Dial** key (Aastra or Polycom phones) once you have dialed the number.

3.3 Emergency calls

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

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

Depending on the configuration of your telephone service, making an emergency call may trigger a notification to be sent to someone in your organization to alert them that you have made an emergency call. This may be done to ensure that the emergency services can be directed to the correct location on your business premises or to discourage the making of hoax calls.

3.4 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 (for example, on snom phones) or the **Dial** key (for example, on Aastra or Polycom phones).

3.5 Ending calls

To end a call replace the handset, or press the **Cancel** key (for example, on snom phones), the **Drop** or **Goodbye** key (for example, on Aastra phones), or the **End Call** key (for example, on Polycom phones).

4 Answering calls

4.1 Using the handset

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

4.2 Using the speaker

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

5 Call Forwarding

5.1 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 Delayed) 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 13 (Business Call Manager), 14 (Easy Call Manager), or 15 (Incoming Call Manager) for instructions on doing this if you have one of these Call Manager services. This section provides instructions on how to set up Call Forwarding using your handset.

You will either hear a confirmation tone or an announcement whenever you make a change to your call forwarding settings.

Your phone system may be configured to support Integrated Call Forwarding, allowing you to enable or disable Immediate/Unconditional, Busy or No Answer/Delayed Call Forwarding across all your SIP devices with a single operation on any of your devices, or in your CommPortal account.

5.2 Immediate, Busy and No Answer Call Forwarding using the handset

5.2.1 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.

For example, to use immediate call forwarding to forward all calls, you would dial ***72**. 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.

5.2.2 Disabling

To disable call forwarding, dial the disable code for that type of call forwarding.

On some telephone systems, you may be able to dial a single access code to turn off all the Immediate, Busy or No Answer Call Forwarding call services.

5.2.3 Access codes

Table 1: Call Forwarding access codes

Type of forwarding	Enable Code	Disable Code
Immediate/Unconditional	*72	*73
Busy	*90	*91
No Answer/Delay	*92	*93
All services	n/a	*94

5.3 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.

5.4 Remote access to Call Forwarding

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

6 Advanced call handling

6.1 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 **R** key or the **Hold** key again (for example, on snom phones) or the **Pickup** key (for example, on Aastra or Polycom phones). If you've made another call since you put the first call on hold, you'll need to end that call or put it on hold before you can retrieve the first one, using the arrow keys to select the call to retrieve.

6.2 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 you should either select the **OK** or **Confirm** key (for example, on snom phones) or the **Answer** key (for example, on Aastra or Polycom phones), 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.

6.3 Cancel Call Waiting

If you do not want to be alerted to a second call, you can disable Call Waiting for the next call by dialing an access code before making a call. If you have a SIP phone that supports Call Waiting, this access code will disable Call Waiting on the SIP phone.

You can also use the same access code during an active call to cancel Call Waiting. If you are in an active call when Three Way Calling is not activated, you must flash-hook first before you dial the access code. Note that you cannot cancel Call Waiting during an active call if you are using a SIP phone with its own Call Waiting service.

6.4 Transferring a call

To transfer a call, follow these steps:

1. Press the **Transfer** key (for example, on snom or Polycom phones) or the **Xfer** key (for example, on Aastra phones) – 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 **Transfer** key (for example, on snom phones), the **Xfer** key (for example, on Aastra phones), or the **Blind** key (for example, on Polycom phones).

4. Alternatively wait until the person has answered before completing the transfer by pressing the **Transfer** or **Xfer** key.

6.5 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 **Conf** key (for example, on snom phones) or the **Conference** key (for example, on Aastra or Polycom phones).
2. Dial the person you want to join your call.
3. Once this person has answered press the **Conf** or **Conference** key again to set up the three way call.

6.6 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 (for example, on snom or Polycom phones) or the **Xfer** key (for example, on Aastra phones).
 - Dial the Call Park access code ***53**.
 - 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.

6.7 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 ***54** followed by the park orbit number.
 - For example, to retrieve a call parked on orbit 1, you should dial ***541**.

6.8 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.

You may be prompted to enter your Call Services PIN before you are able to make a change to your Do Not Disturb setting.

7 Voicemail

7.1 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 *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.

7.2 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 2: Mailbox Commands

To listen to your voice messages from the main menu:	Press 1
To listen to your other messages from the main menu:	Press 1 1
To save a message once you've listened to it:	Press 2
To mark a saved message as new	Press 2 2
To delete a message once you've listened to it:	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 #

8 Conferencing

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

8.1 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.

The account can be configured to either continue the conference or end the conference when the moderator leaves the call.

8.2 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 (they may hear on-hold music while they are waiting). If configured, the conference may start as soon as there are 2 participants, whether or not the moderator is one of them.

8.3 Moderator commands

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

Table 3: Moderator commands

- 1** 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 press ***** to drop the call and return to the conference.
- 2** Mute or un-mute the moderator.
- 3** Lock or unlock the conference. When locked no-one else can join the conference.
- 4** Provide a roll-call of participants.
- 5** Provide a count of participants.
- 6** Selects whether announcements should be made when participants join and leave.
- 7** Announces the name of the last person to join the conference.
- 8** Turns conference call recording on or off.
- 9** Mute or un-mute all participants.
- 01** Record a greeting to be played to participants when they join the conference.
 - You will hear an announcement giving instructions for recording the secondary greeting.
 - Press **2** to start recording. Record the greeting and then press **#**.
 - Press **1** to hear the recording you have just made.
 - When you are happy with the new greeting, press **3** to save it.
- *** 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.

8.4 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>.
2. Enter your moderator and participant code.
3. Select *Submit*.

9 Other phone features

9.1 Speed dials

Your Metaswitch Networks 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 20.
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 12.2.
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 12.4 for how to do this.

9.2 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 on hold on that extension, the lamp will blink slowly.
- 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.

9.3 Paging

Paging (also known as Intercom) is a feature which allows one phone user to press a key on their phone and for whatever they say to automatically come out of another phone's speaker. The user of that other phone doesn't have to answer their phone. It is often used in an executive/assistant pairing.

If you have a paging key on your phone, then to page the destination, follow these steps:

- Pick up your handset.
- Press the paging key.
- Speak into the phone. Your voice will automatically come out of the other phone.

To finish paging, hang up the phone or release the paging key.

9.4 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 18.4.

9.5 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.

9.6 Further information

If you want a more detailed description of the operation of your model of phone, please refer to the manufacturer's instructions. The instructions for the following phones can be found on their websites: snom (<http://www.snom.com/>), Aastra (<http://www.aastratelecom.com/>), Cisco (<http://www.cisco.com>) or Polycom (<http://www.polycom.com/>).

10 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.

10.1 Accessing

To access CommPortal point a browser at <https://hosted.sp.net/>.

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

- Internet Explorer 11
- Edge
- Firefox
- Google Chrome (Windows only)

JavaScript must be enabled on your browser.

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

10.2 Logging in

The following shows a sample CommPortal login page.

Figure 1: CommPortal login page

CommPortal Web

Please log in below.

Email / Number:

Password:

[Reset Password](#)

Remember me on this computer.

[Login](#)

To log into CommPortal enter your phone number or, if this is enabled in your system, your account email address, followed by your password, and click on *Login*.

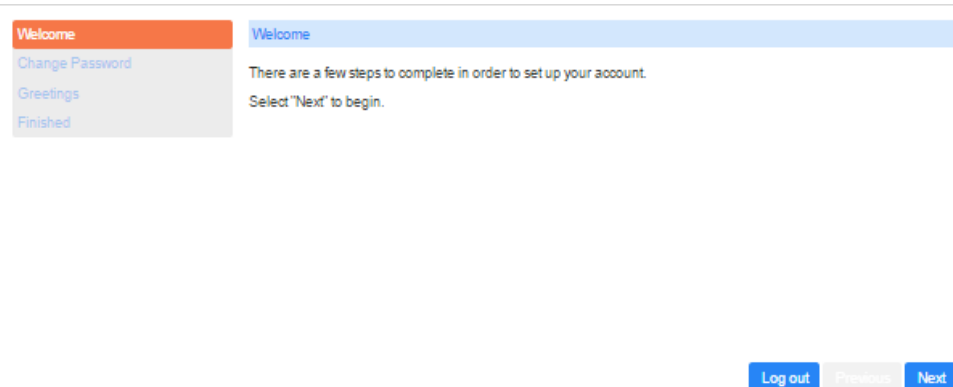
- If this is the first time you have attempted to log in, you will have to click the **Reset password** link to set a new password, even if your service provider has given you an initial password.
- If you have forgotten or do not know your password, or the screen displays a message that your password has expired, click the **Reset password** link and follow the instructions to set up a new password.

If you are using a public computer, do not tick the *Remember me on this computer* checkbox and always make sure you explicitly log out of CommPortal when you have finished, as described in 10.6, to protect your account from being accessed by other users.

10.2.1 Using the CommPortal initialization wizard

In some systems, you may need to complete an initialization wizard to set up your account when you log in to CommPortal for the first time. This will prompt you to change your password and, if you have one, your PIN, and record your name and a default greeting which will be played each time a caller accesses your CommPortal mailbox. You may also be asked for an account email address, which you can choose to use to log in instead of your phone number and will also allow you to recover your password if you forget it.

Figure 2: CommPortal Initialization Wizard



- From the Welcome screen, click *Next* to begin.
- Follow the instructions to change your password.
 - You must complete this step before you can access your account, but you can use the TUI to do this if you prefer.
 - In some systems, there may be password checks to ensure that you choose a password that cannot easily be guessed by a malicious user. If you choose a password that does not pass these checks, for example because it includes your telephone number, you will see an explanation and be prompted to enter a different password.
- When you have successfully entered your new password, click *Next* to continue to the next step.

- Now, if prompted, follow the instructions to set up an account email address and optionally choose to use it for logging in instead of your account phone number. This email address will also be used to send you notifications of password changes and to send forgotten password links.
- When you have successfully entered your account email, click *Next* to continue to the next step.
- Now, if you have one, change your PIN, and click *Next*.
- If you have a microphone on your computer, you may want to record your spoken name and initial greeting now, but you can click *Later* if you do not want to do this now.

Once you have completed the password and PIN steps, you can access your CommPortal account.

10.2.2 Changing your password

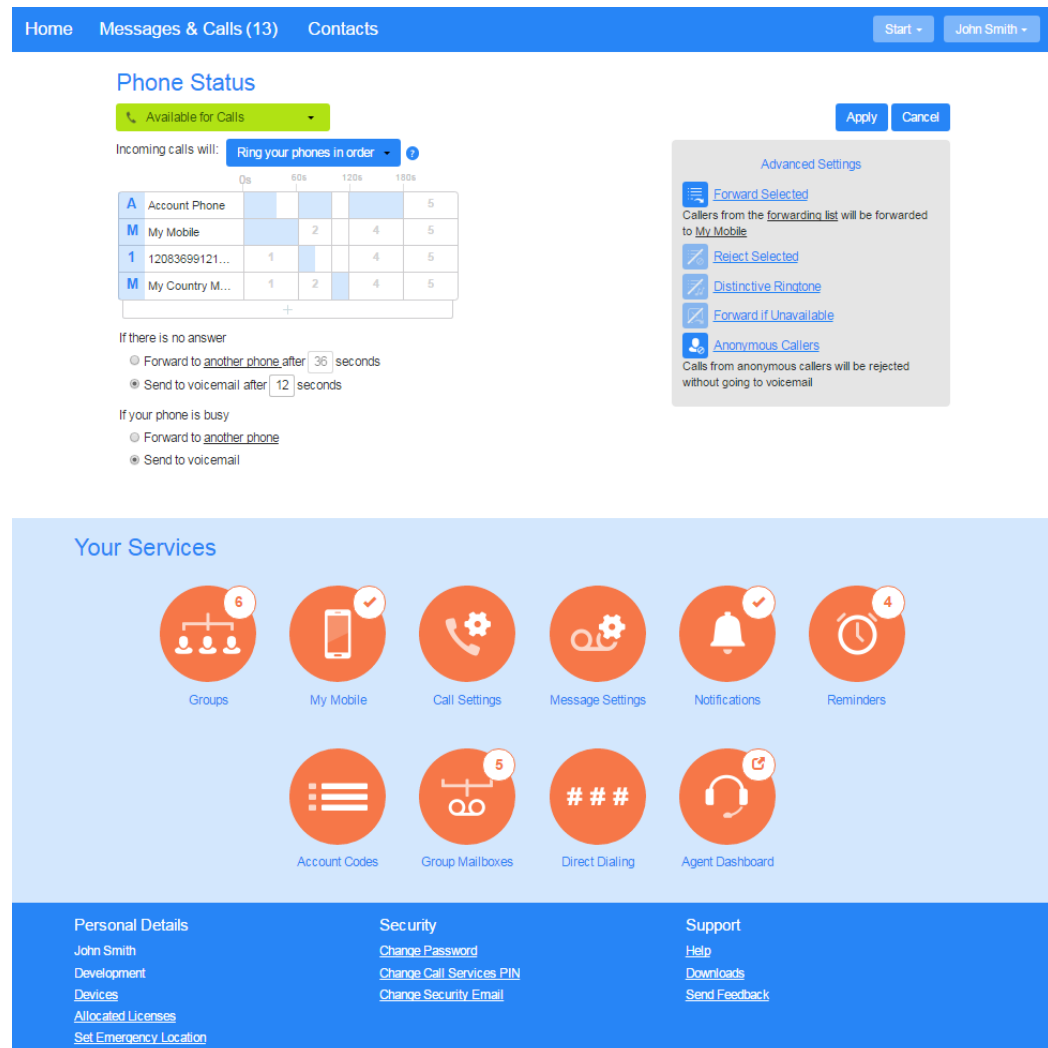
There are two ways to change your password:

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

10.3 Using CommPortal

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

Figure 3: CommPortal Home page



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

- **Home.** This is the home page you see when you first log into CommPortal. This becomes a Back button on other screens so that you can easily find your way back to the Home page.
- **Messages & Calls.** This shows you all of your voice, fax and video messages, and the calls you've made, answered or missed.
- **Contacts.** You can add and view all of your contacts and their phone numbers in this tab.
- **MakeCall/Start.**
 - **Make Call.** This launches a Dialer so that you can make calls directly from CommPortal.

- If you have Meeting, instead of **Make Call**, you will see a **Start** button with a drop-down that includes the **Make Call** option as well as links to Meeting so that you create Meetings and/or manage Webinars.
- Your name, with a drop-down where you can log out of CommPortal. You should log out of your account when you have finished to avoid the risk of someone else accessing it. This is particularly important if you are viewing CommPortal on a shared computer.
- If you have any other lines associated with your CommPortal account, this drop-down will also include a links to the UIs for those lines.

The main panel shows your Phone Status.

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

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

- **Reminders.** This page allows you to set up reminder calls.
- **Groups.** Here you can view any groups your line belongs to, such as hunt groups. You can also login and logout of groups here.
- **Call Settings** and **Messaging Settings.** Here you can configure how calls and messages are handled.

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

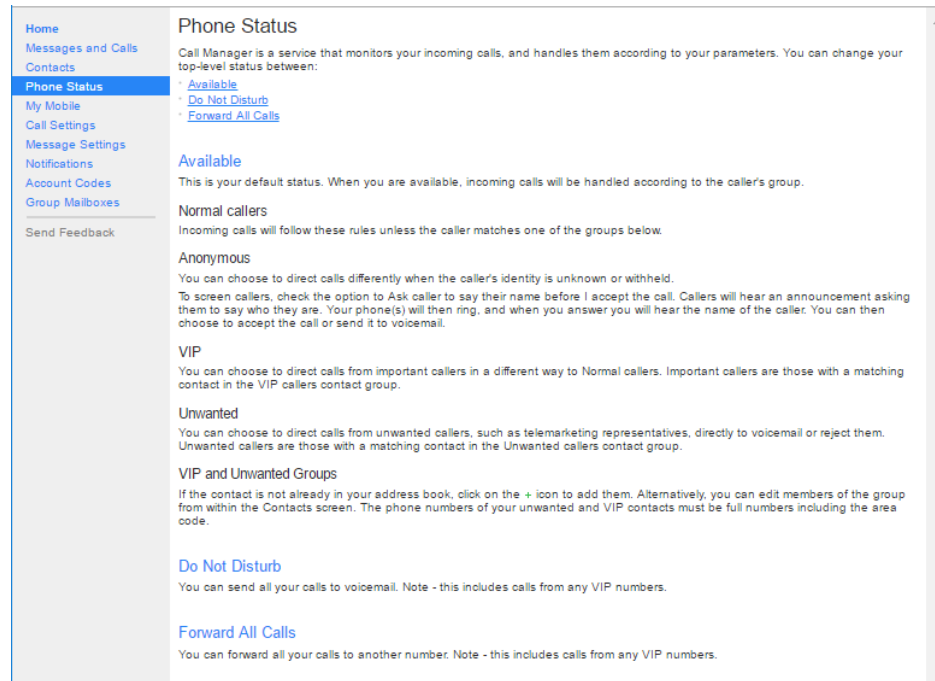
Using the functions in each of these pages is described in more detail in the rest of this document.

10.4 Getting help

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

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

Figure 4: CommPortal Help

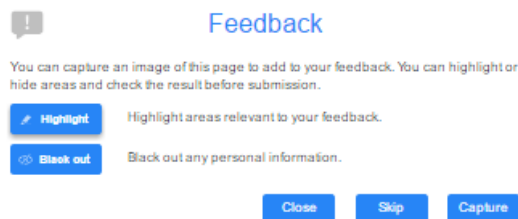


10.5 Sending Feedback

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

You will then see a pop-up.

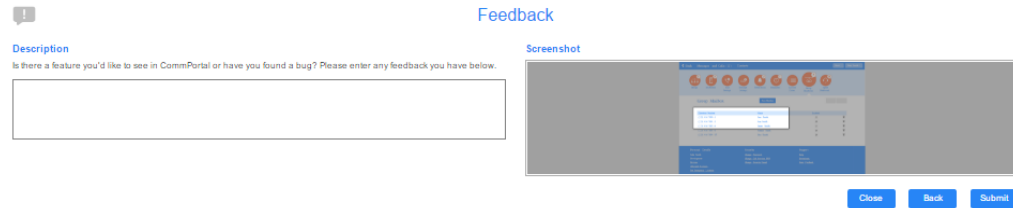
Figure 5: CommPortal Send Feedback



- If you want to include a screenshot of the CommPortal interface:
 - Highlight particular areas of the screen by selecting **Highlight**, positioning the cross-hatch and then dragging – the area that will be included in the screenshot will be highlighted.
 - Use the **Black out** option to disguise any personal information
 - Click **Capture**.
- If you do not want to include a screenshot, click **Skip**.

- This launches a second screen, with the screenshot on the right (if you have taken one) and a box where you can add a description of the problem you have encountered or enhancement you would like to see.

Figure 6: Send Feedback second pop-up



The screenshot shows a feedback form titled "Feedback". On the left, under the heading "Description", there is a text input box with the prompt "Is there a feature you'd like to see in CommPortal or have you found a bug? Please enter any feedback you have below." On the right, under the heading "Screenshot", there is a screenshot of the CommPortal interface. At the bottom right of the form, there are three buttons: "Close", "Back", and "Submit".

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

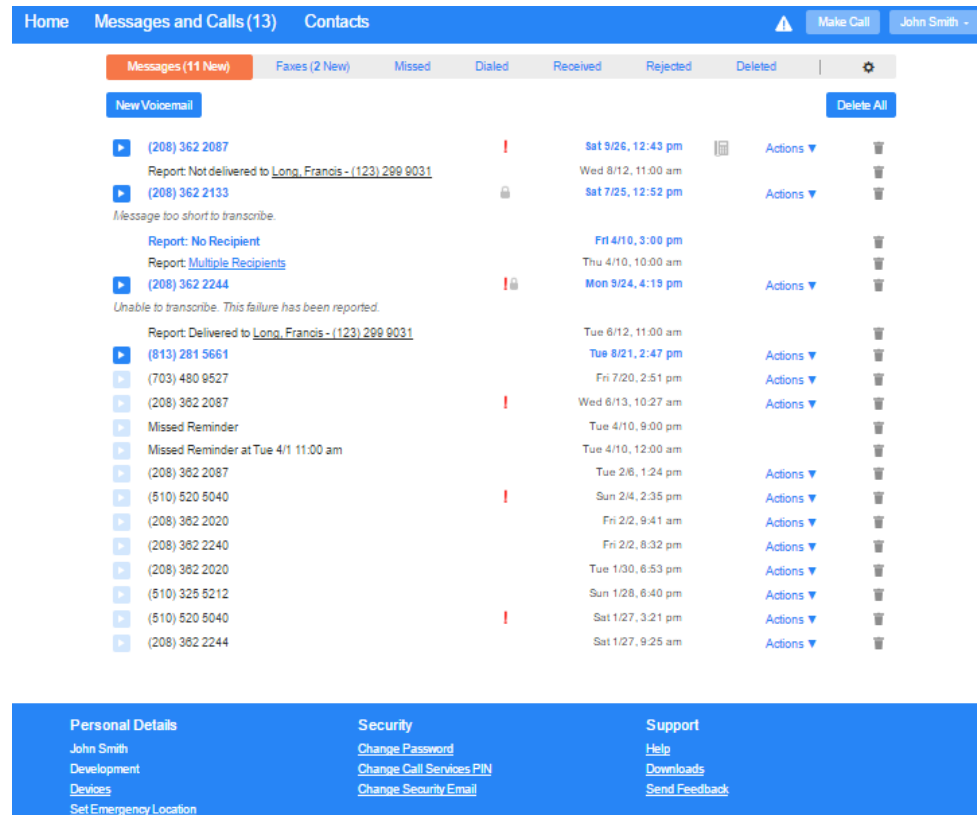
10.6 Logging out

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 drop-down arrow alongside your name at the top of the screen, and then selecting **Logout**.

11 Messages & Calls

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

Figure 7: CommPortal Messages & Calls page



- The *Messages* tab shows you all of your new and stored voice messages.
- The *Faxes* tab shows you any new and stored fax messages.
- The *Missed* tab displays the recent calls you have received and not answered.
- The *Dialed* tab displays the recent calls you have made, including those made by Click To Dial as described in Section 19.
- The *Received* tab shows the recent calls you have answered.
- The *Rejected* tab shows the recent calls that you have rejected (if you have a Call Manager service, as described in Chapters 13 (Business Call Manager), 14 (Easy Call Manager) and 15 (Incoming Call Manager)).
- In some systems, you will see a *Deleted* tab, which shows any messages that you have deleted on the other tabs.

These tabs are described in more detail below.

11.1 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 8: Messages & Calls – Messages tab

The screenshot displays a web interface for managing messages. At the top, there are navigation tabs: Home, Messages and Calls (13), and Contacts. Below this, there are filters for Messages (11 New), Faxes (2 New), Missed, Dialed, Received, Rejected, and Deleted. A 'New Voicemail' button is on the left, and a 'Delete All' button is on the right. The main area contains a list of messages with columns for playback status, sender information, time, and actions.

Message ID	Sender	Time	Status	Actions
(208) 362 2087		Sat 9/26, 12:43 pm	Unheard	Actions
Report: Not delivered to Long, Francois - (123) 299 9031				
(208) 362 2133		Wed 8/12, 11:00 am	Unheard	Actions
Message too short to transcribe.				
Report: No Recipient				
Report: Multiple Recipients				
(208) 362 2244		Fri 4/10, 3:00 pm	Unheard	Actions
Unable to transcribe. This failure has been reported.				
Report: Delivered to Long, Francois - (123) 299 9031				
(813) 281 5661		Thu 4/10, 10:00 am	Unheard	Actions
(703) 480 9527		Mon 9/24, 4:19 pm	Unheard	Actions
(208) 362 2087		Tue 6/12, 11:00 am	Unheard	Actions
Missed Reminder		Tue 8/21, 2:47 pm	Unheard	Actions
Missed Reminder at Tue 4/11 11:00 am		Fri 7/20, 2:51 pm	Unheard	Actions
(208) 362 2087		Wed 6/13, 10:27 am	Unheard	Actions
(510) 520 5040		Tue 4/10, 9:00 pm	Unheard	Actions
(208) 362 2020		Tue 4/10, 12:00 am	Unheard	Actions
(208) 362 2240		Tue 2/6, 1:24 pm	Unheard	Actions
(208) 362 2020		Sun 2/4, 2:35 pm	Unheard	Actions
(208) 362 2240		Fri 2/2, 9:41 am	Unheard	Actions
(208) 362 2020		Fri 2/2, 8:32 pm	Unheard	Actions
(510) 325 5212		Tue 1/30, 6:53 pm	Unheard	Actions
(510) 520 5040		Sun 1/28, 6:40 pm	Unheard	Actions
(208) 362 2244		Sat 1/27, 3:21 pm	Unheard	Actions
(208) 362 2244		Sat 1/27, 9:25 am	Unheard	Actions

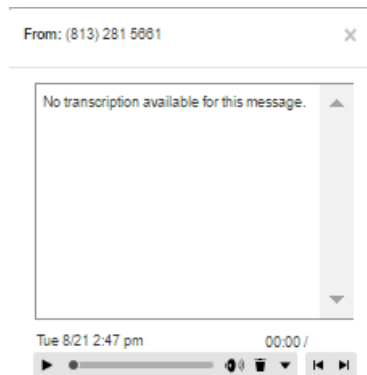
At the bottom of the interface, there are three sections: Personal Details (John Smith, Development, Devices, Set Emergency Location), Security (Change Password, Change Call Services PIN, Change Security Email), and Support (Help, Downloads, Send Feedback).

11.1.1 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 9: Voicemail Player



With this player you can:

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

11.1.2 Deleting a message

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

- In some systems, the message will then be permanently deleted.
- In some systems, the message will be moved to the *Deleted* tab described in section 11.6.

11.1.3 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:


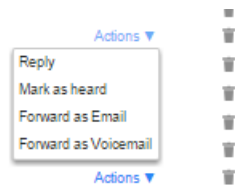
- Click on the Actions  icon to the right of the message and select **Mark as heard** from the dropdown.

Figure 10: Message options drop down menu



11.1.4 Marking a message as new

To mark a message as new, follow these steps:

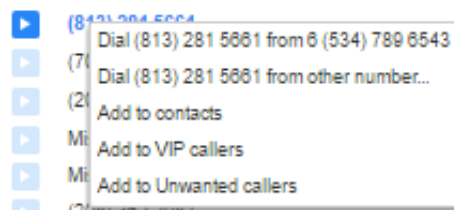
1. Click on the Action icon to the right of the message, as shown in Figure 10.
2. Select **Mark as new** from the dropdown.

11.1.5 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 required *Dial* option.

Figure 11: Call back message sender



11.1.6 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 12 for more information on using the Contacts page.

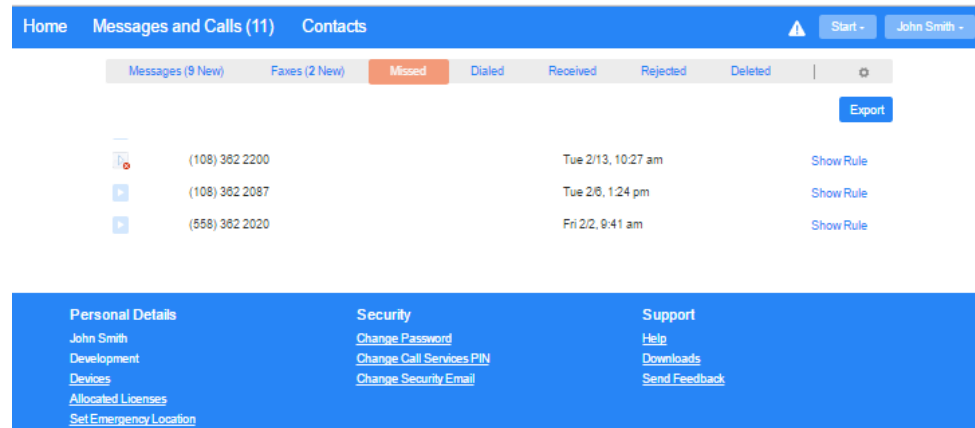
11.2 Faxes

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

11.3 Missed

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

Figure 12: Messages & Calls – Missed tab



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

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

11.3.1 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 12 for more information on this.

11.4 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 19):

11.4.1 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 12 for more information on using the Contacts page.

11.5 Received

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

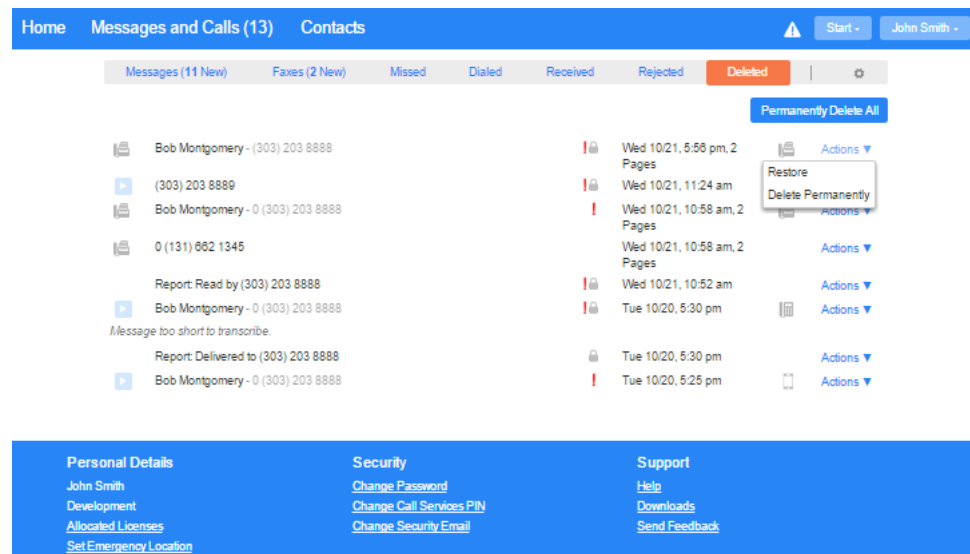
11.5.1 Add number to contacts

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.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 12 for more information on using the Contacts page.

11.6 Deleted

This page shows you all the messages that you have deleted from the other tabs on the *Messages & Calls* pages. These will also include any faxes and delivery reports.



11.6.1 Listen to deleted messages

To listen to messages on this tab:

1. Click the play icon to the left of the message
2. Use the Voicemail Player described in section 11.1.1.
3. Click the *Restore* button on the Voicemail player if you want to return this message to the *Messages* tab.

11.6.2 View deleted faxes

You can view faxes on this tab by clicking on the fax icon.

11.6.3 Restoring deleted messages and faxes

To restore messages and faxes:

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

11.6.4 Permanently delete messages

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

To delete a single item:

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

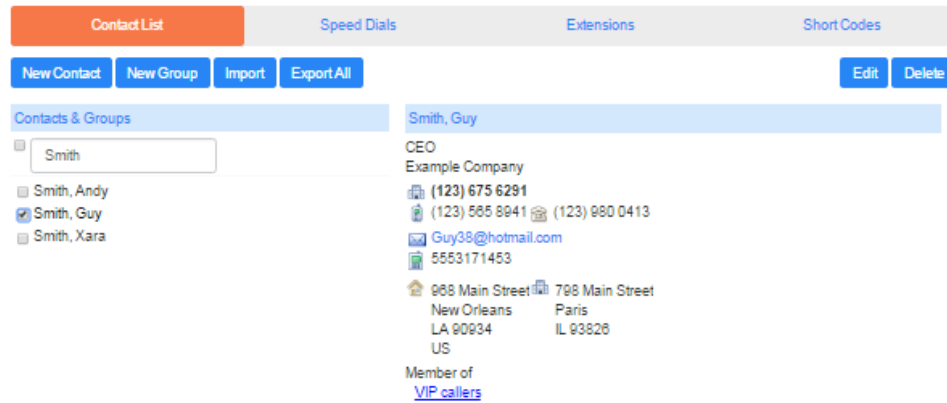
To delete all the messages and faxes on this tab:

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

12 Contacts

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

Figure 13: CommPortal Contacts page



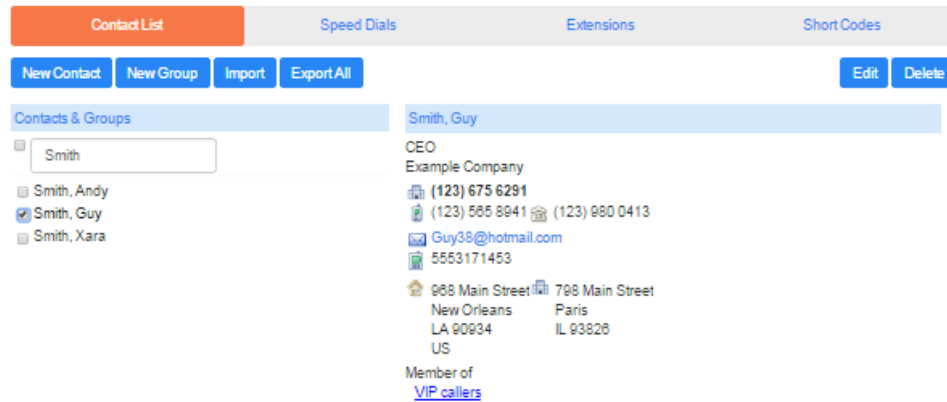
- The Contact List tab allows you to manage your personal contact list.
- The Speed Dials tab is where you configure your numeric speed dials (if your phone supports these).
- The Extensions tab shows you the extensions within your business.
- The Short Codes tab shows you your business's numeric speed dials.

Each of these sections is described in more detail below.

12.1 Contact List

The Contact List shows you all of your contacts:

Figure 14: Contacts – Contact List tab



12.1.1 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:

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

12.1.2 Add a new contact

To add a new contact, follow these steps:

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

Figure 15: CommPortal new contact page

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

Your new contact will now have been added.

12.1.3 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*.

12.1.4 Deleting a contact

To delete a contact, follow these steps:

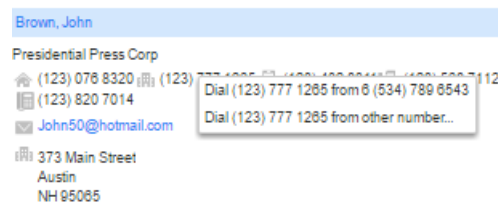
1. Select the contact you wish to delete from the list on the left hand side of the screen.
2. Click *Delete*.

12.1.5 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 appropriate *Dial* option.

Figure 16: Calling a contact from the Contact List



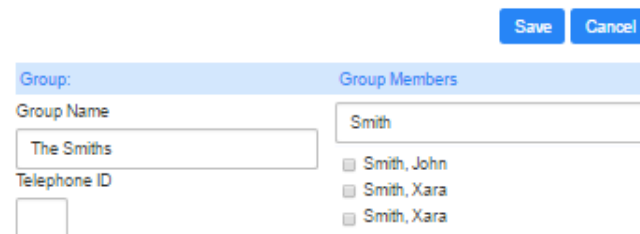
12.1.6 Groups

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. Groups are distinguished by an icon and will appear at the top of your list of contacts.

To add a new group, follow these steps:

- Click on *New Group*.

Figure 17: Adding a new group – entering details



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

- Click on *Save*.

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

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

To edit a group, follow these steps:

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

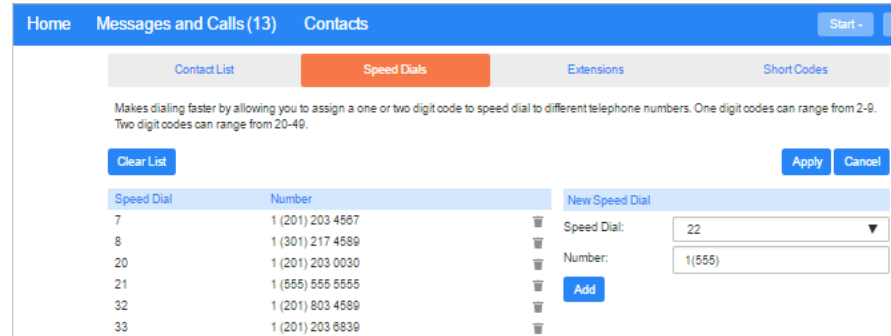
To delete a group, follow these steps:

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

12.2 Speed Dials

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

Figure 18: 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 20.

12.2.1 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.

12.2.2 Deleting a speed dial

To delete a speed dial, follow these steps:

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

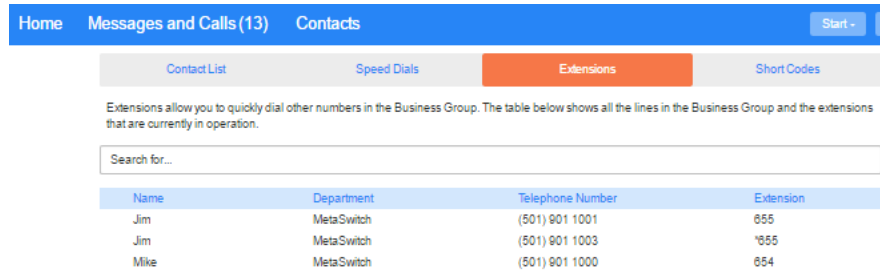
Alternatively to delete all of your speed dials, follow these steps:

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

12.3 Extensions

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

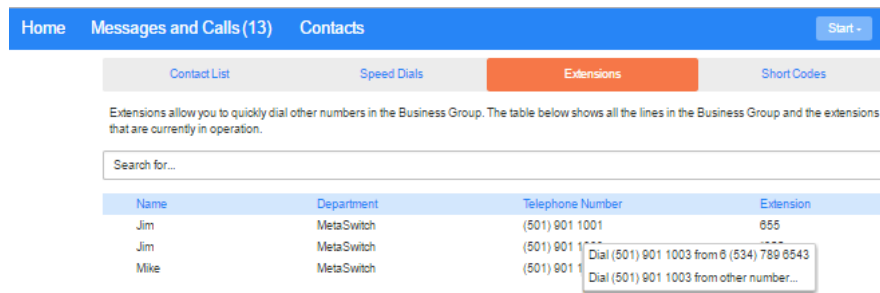
Figure 19: Contacts – Extensions tab



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 20: Using Click To Dial from the Extensions tab

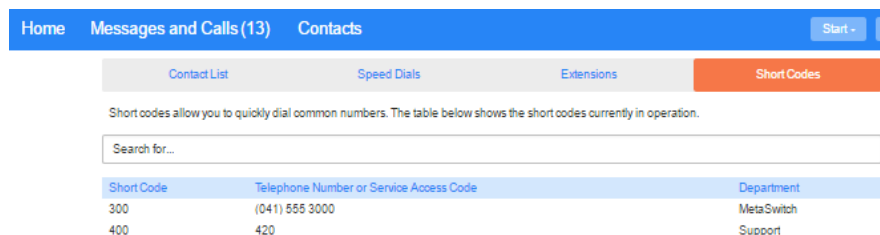


Your administrator sets up these extensions.

12.4 Short codes

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

Figure 21: Contacts – Short Codes tab

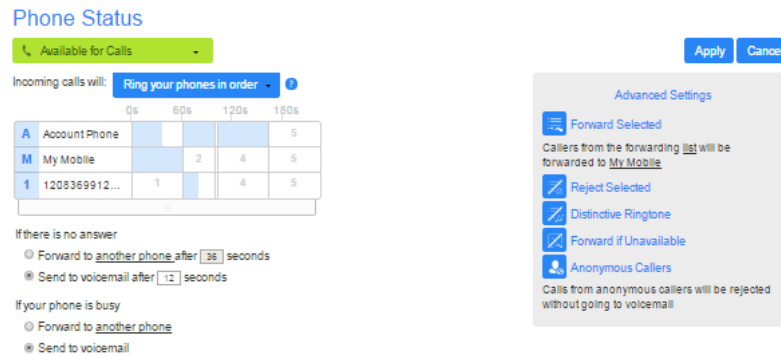


You can dial these short codes from any phone in the business to reach the destination. Your administrator sets up these short codes. Short codes may also include a name to help you identify them. These names will appear in your SIP phone's address book alongside your Business Group contacts and in your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

13 Business Call Manager (BCM)

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

Figure 22: Business Call Manager



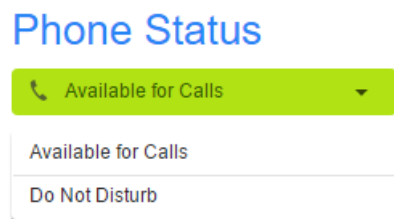
This chapter sets out how to use the **Phone Status** panel on the Home page to configure Business Call Manager.

- See 13.1 for details of how to set your availability.
- See 13.2 for details of how to configure your incoming call settings
- See 13.3 for details of how to configure advanced call settings
- See 13.4 for details of how to use the pop-ups that appear when you are setting call forwarding numbers or creating lists of callers to whom a particular call setting will apply.

13.1 Setting your availability

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

Figure 23: Configuring availability



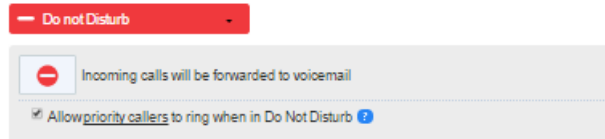
Use your mouse to select your status.

If you select *Do Not Disturb*:

- the lozenge turns red

- your incoming calls will usually be diverted to voicemail, although you can choose to allow priority callers to ring your phone as usual
- if you have also turned on Busy Call Forwarding, you will see a warning icon – when you click on this, you will see a pop-up explaining that calls will be forwarded to the Busy Call Forwarding number. You can click a link to deactivate this service if you want calls to either be rejected or, if you have a voicemail service, sent to voicemail.

Figure 24: Do Not Disturb



13.2 Incoming Call Settings

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

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

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

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

Configuring how your phone(s) will ring

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

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

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

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

Figure 25: Configuring ringing order

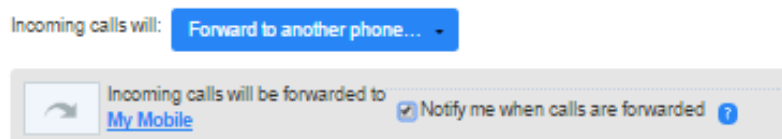
		0s	30s	1m
M	My Mobile		2	3
A	Account Phone	1		3
2	2345550220		2	

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

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

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

Figure 26: Forwarding incoming calls



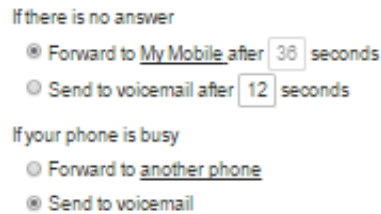
- Click the link to enter the phone number.
- Tick the checkbox if you want to be notified when calls are forwarded.

- If you configure call forwarding here, incoming calls are no longer under Business Call Manager control, so your Delayed or Busy call forwarding settings will be disabled.

Call Forwarding Settings

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

Figure 27: Call Forwarding Settings

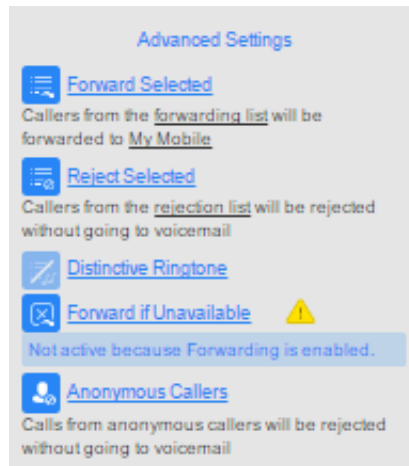


- Use the text box to type in the number of seconds that your phone should ring before it is either forwarded to another number or the call is rejected.
 - If you have configured a ringing order for your phones, you must ensure that this is longer than the total length of time set for the ringing sequence.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

13.3 Configuring Advanced Settings

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



Figure 28: Advanced Settings panel






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

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

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

-  **Forward Selected.**
 - Click on *forwarding list* to configure the list of numbers whose calls you want to forward.
 - Click the link on the phone number to set or change the number that calls from these callers will be forwarded to.
-  **Reject Selected.**
 - Click on *rejection list* to set up the numbers where calls should immediately be rejected.

-  Distinctive Ringtone
 - Click on *distinctive ringing list* to enter any phone numbers which should ring your phone(s) with a different ringtone.
-  Forward if unavailable
 - Click the link to set or change the number that calls will be forwarded to if your line is unavailable, for example because your phone is unplugged or has lost power.
-  Anonymous Callers
 - When enabled, calls from an unknown number will be rejected without going to voicemail.

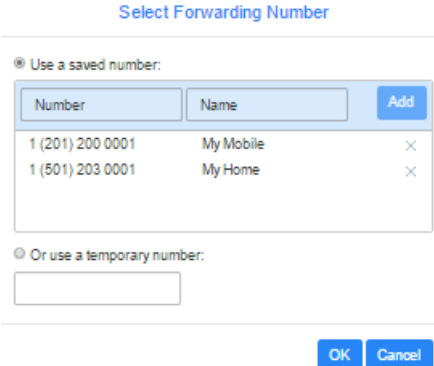
13.4 Selecting forwarding numbers and creating caller lists

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

13.4.1 Selecting forwarding numbers

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

Figure 29: Select Forwarding Number



Select Forwarding Number

Use a saved number:

Number	Name	
1 (201) 200 0001	My Mobile	×
1 (501) 203 0001	My Home	×

Or use a temporary number:

- To add a number, enter the Number and Name in the input boxes, and click Add.
- To delete a number from the list, click x alongside the entry.

- When configuring a call forwarding service, either select the number in the list that you want to use or enter a temporary number, and then click OK.

13.4.2 Creating caller lists

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

Figure 30: Caller List example

The screenshot shows a web interface for configuring a 'Selective Call Forwarding Screening List'. At the top, it says 'Forward calls from the following numbers'. Below this is a tabbed interface with 'List' selected. There is an input field containing '(208)' and an 'Add New' button. Below the input field, a list of numbers is displayed: '(208) 362 2023', '(208) 362 2087', and '(208) 362 2120', each with a trash icon to its right. At the bottom of the interface, there are three buttons: 'Clear List', 'OK', and 'Cancel'.

- You can add someone to a list by typing their number in the input box and clicking *Add New*.
 - If you know someone is in your contact list, you can simply enter their name or number in this input box to search for them in your Contacts. BCM will display matches as they occur.
- You can delete a number by clicking the trash icon on the right, or select **Clear List** if you want to remove all the numbers currently on the list.
- You can also select people directly from your Contact or Extensions lists by clicking those links and ticking the checkbox(es) alongside the entries you want to include.
- You will see the warning icon if you add a caller to a list that would create interaction conflicts with other lists.
 - Click on the icon to see why there is an issue.
 - You can choose whether or not to resolve the issue, for example by deleting the contact from the conflicting list. However, if you do not resolve it, then unexpected call handling behavior may occur.

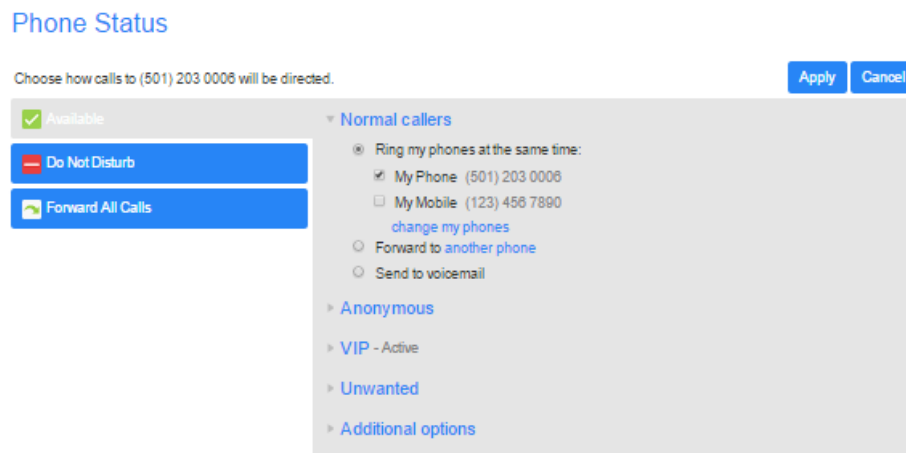
14 Easy Call Manager (ECM)

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

14.1 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 31: ECM Available profile



14.1.1 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 top 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 *change my phones*. The following popup will appear.

Figure 32: My Phones input list

My Phones

Setup phone numbers that you can choose to ring.

Name	Number	
My Phone	(501) 203 0008	🗑
My Mobile	(123) 456 7890	🗑
My Home		🗑
		🗑
		🗑

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 trash 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.

14.1.2 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 top 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

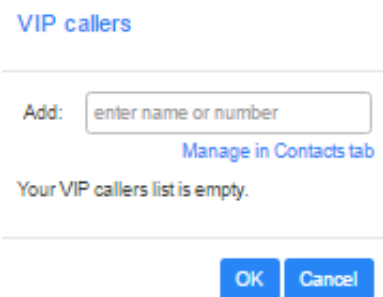
This will send all calls from anonymous callers directly to voicemail. To enable this option, check the radio button next to it.

14.1.3 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 top 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 33: Adding 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 trash icon to the right of their name.

Clicking on *Manage in Contacts tab* allows you to set up your VIP callers as a contact group on the *Contacts* page.

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 32.

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*.

14.1.4 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 34: Adding Unwanted callers

Unwanted callers

Add:

[Manage in Contacts tab](#)

Your Unwanted callers list is empty.

OK Cancel

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 trash icon to the right of their name.

Clicking on *Manage in Contacts* tab allows you to set up your **Unwanted callers** as a contact group on the Contacts page.

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. These calls will appear on the *Rejected* tab on the *Messages & Calls* screen described in Chapter 11.

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.

14.1.5 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.

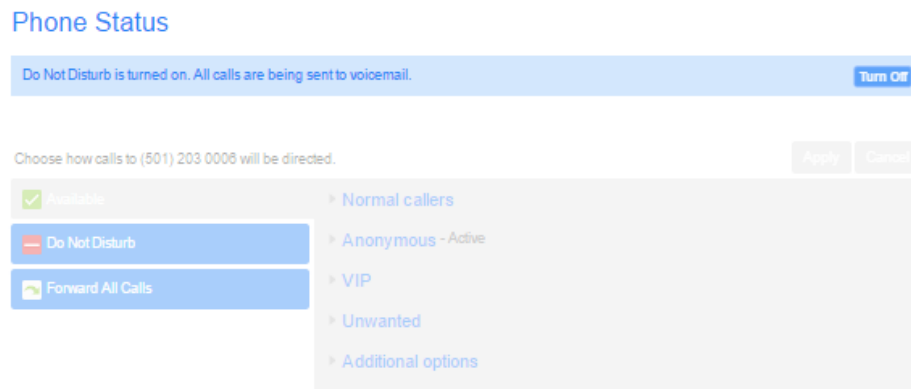
Send to voicemail

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

14.2 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 35: ECM Do Not Disturb profile



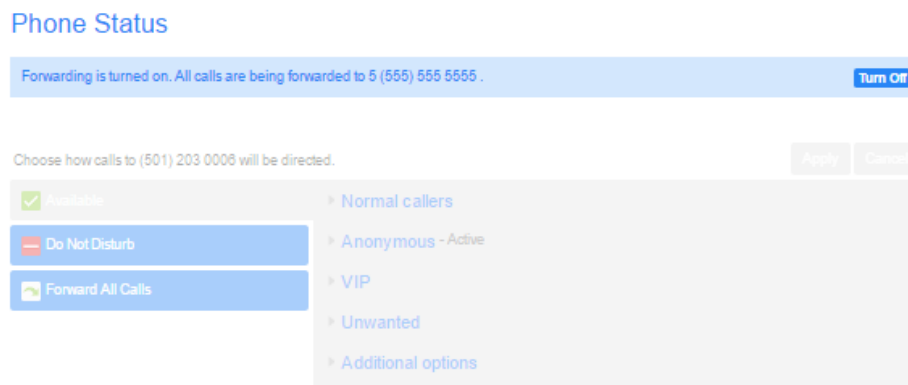
To turn the Do Not Disturb profile off again, click the *Turn Off* button in the top right hand corner of the Call Manager tab. You will not be able to make any changes to your Call Manager settings while the Do Not Disturb profile is turned on.

14.3 Forward All Calls profile

The Forward All Calls profile will forward all incoming calls to the phone number of your choice. If your system supports integrated call forwarding, any changes made here will automatically be replicated on any other devices associated with your CommPortal account.

To activate the Forward All Calls profile, click on the *Forward All Calls* button. 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 blue 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 36: ECM 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 37: Configuring a Forwarding number

Forward calls to:

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.

15 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.

15.1 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.

Figure 38: CommPortal Incoming Call Manager summary page

From this page you can

- quickly change your forwarding settings by selecting a radio button under the *When I Receive a Call* section

- control the behavior if you have chosen to have your phone ring by selecting the radio buttons under *Additional options*
- select what audio callers should hear before their call is answered by selecting either to use the default ringback audio or record/upload custom ringback.
 - If you upload or record custom ringback, the audio file must use one of the following formats: G711 WAV (8-bit, ulaw / alaw, mono, 8kHz), 16-bit PCM WAV (16-bit, PCM, mono, 16kHz), and must be within the maximum permitted length for greetings. You must also ensure you have the necessary rights to use any file that you are uploading.

15.2 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 trash 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 39: Adding a new ICM rule (1)

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

When I receive a call from

- an individual contact:
- a group of contacts:
- anyone on my contact list
- anyone in my business group
- this number or group of numbers:
- an anonymous number

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 or group of numbers – Apply to a specific phone number. Can be any number.
- An anonymous number – Apply to any caller who has restricted their calling number.

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

Figure 40: Adding a new ICM rule (2)

[Add a new rule to the "Normal" set of rules](#)

When I receive a call from anyone in my business group

- ring my phone using the Standard Ringtone ▼
- forward to
- send to voicemail
- play a reject message and reject the call
- ask the caller to say their name before I accept the call
- ring more than one phone at the same time or in sequence
- ask the caller to say their name before ringing more than one phone at the same time or in sequence

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 41: Adding a new ICM rule (3)

[Edit a rule in the "Normal" set of rules](#)

Choose which phones you would like to ring when you receive a call from anyone in your business group

Seconds into call: 0 30 60 90 120

My Phone (555) 555 5555

00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120
----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Phone Number: Start: End:

Ring my phone using

If I don't answer or all lines are busy, forward to

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 42: Incoming Call Manager – Rules tab

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

When no rules apply

ring my phone using the Standard Ringtone ▼

forward to enter a number ▼

send to voicemail

play a reject message and reject the call

ask the caller to say their name before I accept the call

ring more than one phone at the same time or in sequence

ask the caller to say their name before ringing more than one phone at the same time or in sequence

< Back Next > Finish Cancel

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

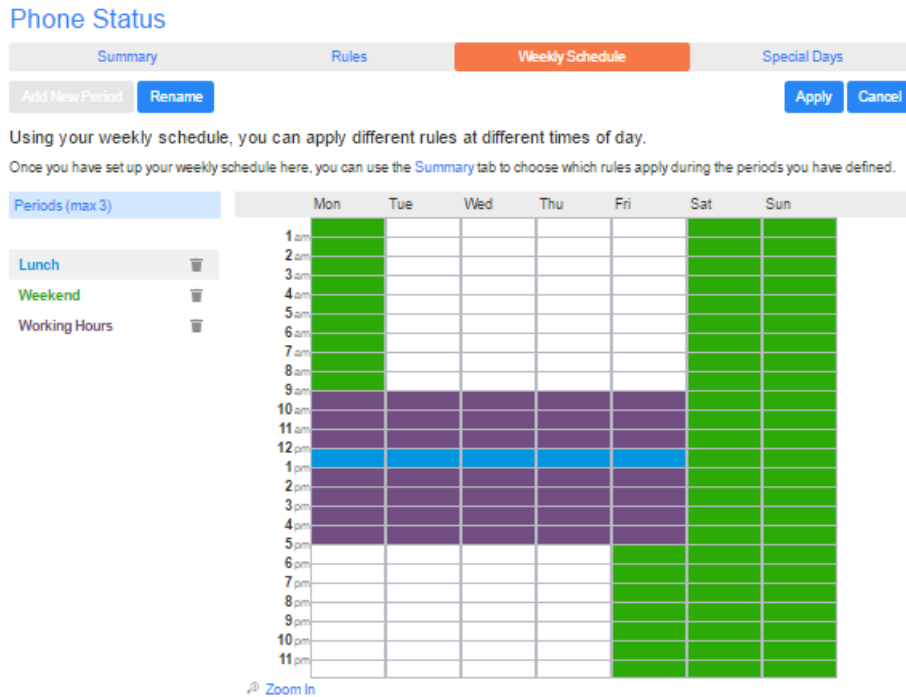
15.3 Schedule based routing

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.

- Begin with an example schedule that you can customize.
- Begin with a blank schedule that you can set up from scratch.

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

Figure 43: Incoming Call Manager – Weekly Schedule tab

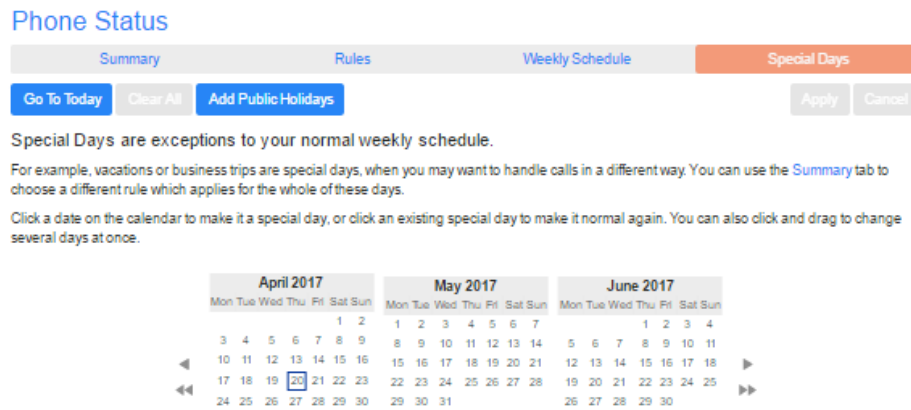


1. Select the period that you want to modify.
2. Using your mouse, point to the day and time you want to change and click the mouse. To change multiple time periods, left click and hold the mouse button and drag across the days and time periods you wish to change.
3. To rename a period, click the rename button and enter the new name.
4. To delete a period, click the trash icon. You can then choose **Add New Period** if you want to add an alternative.
5. Click *Apply*.



15.4 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 44: 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*

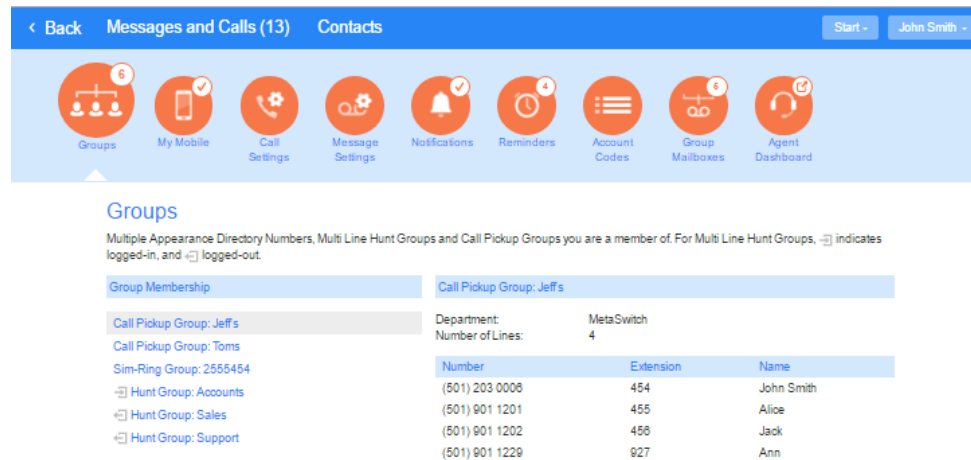
To have the system automatically define public holidays:

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

16 Groups

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

Figure 45: CommPortal Groups page



There are a number of different types of groups:

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



16.1 Hunt Groups (Multi Line Hunt Groups)







16.1.1 Viewing Hunt Groups

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

Figure 46: Groups – Multi Line Hunt Groups

Groups

Multiple Appearance Directory Numbers, Multi Line Hunt Groups and Call Pickup Groups you are a member of. For Multi Line Hunt Groups,  indicates logged-in, and  logged-out.

Group Membership		Hunt Group: Sales			
Call Pickup Group: Jeff's		Department:	MetaSwitch		
Call Pickup Group: Toms		Number of Lines:	3 (Logged in: 1)		
Sim-Ring Group: 2555454		Status:	You are currently not logged in to this Hunt Group (Login)		
 Hunt Group: Accounts					
 Hunt Group: Sales					
 Hunt Group: Support					
Position	Number	Extension	Name		
1	(501) 203 0006	454	 John Smith		
2	(501) 901 1251	557	 Zorro		
3	(501) 901 1269	956	 Sim-Ring Group		

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

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

16.1.2 Using Hunt Groups

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

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

Using Your Phone

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


1. Pick up your phone handset.
2. Dial the Hunt Group login access code: *321 followed by the number of the Hunt Group.

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

1. Pick up your phone handset.
2. Dial the Hunt Group logout access code: *322.

Using CommPortal

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

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



16.2 Call Pickup Groups




16.2.1 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 *Call Pickup Group: **name***. Click on this entry to view that Call Pickup Group:

Figure 47: Groups – Call Pickup Groups

Groups

Multiple Appearance Directory Numbers, Multi Line Hunt Groups and Call Pickup Groups you are a member of. For Multi Line Hunt Groups,  indicates logged-in, and  logged-out.

Group Membership	Call Pickup Group: Toms		
Call Pickup Group: Jeff's	Department:	MetaSwitch	
Call Pickup Group: Toms	Number of Lines:	3	
Sim-Ring Group: 2555454	Number	Extension	Name
 Hunt Group: Accounts	(501) 203 0008	454	John Smith
 Hunt Group: Sales	(501) 901 1301	458	Bob
 Hunt Group: Support	(501) 901 1302	459	Jorge

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

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

16.2.2 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: *311.

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: *312.
3. Dial the extension number on which the call is ringing.

16.3 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 *Sim-Ring Group: **name***. Click on this entry to view that *Sim-Ring Group*:

Figure 48: Sim-Ring Groups

Groups

Multiple Appearance Directory Numbers, Multi Line Hunt Groups and Call Pickup Groups you are a member of. For Multi Line Hunt Groups, indicates logged-in, and logged-out.

Group Membership		Sim-Ring Group: 2555454		
Call Pickup Group: Jeffs		Department:	MetaSwitch	
Call Pickup Group: Toms		Number of Lines:	6	
Sim-Ring Group: 2555454		Number	Extension	Name
<input type="checkbox"/> Hunt Group: Accounts		(501) 203 0006	454	John Smith
<input type="checkbox"/> Hunt Group: Sales		(501) 901 1029	827	Peter
<input type="checkbox"/> Hunt Group: Support		(501) 901 1031	701	Matt
		(501) 901 1401	702	Paul
		(501) 901 1429	704	Nick
		(501) 901 1431	705	Mark

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

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

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

17 Using the Agent Dashboard

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

Figure 49: Integrated ACD Agent status screen

The screenshot shows the 'Agent Status' interface. At the top, there is a blue header with 'Agent Status' on the left, 'Send Feedback' and 'Logged in as: John Smith' on the right, and a 'Current state: Available' dropdown menu. Below the header, a gray box displays an 'Incoming Call from: 2012037824'. Underneath this, a table shows details for the 'Support' queue: Predicted Waiting Time (0:30), Callers Waiting (1), Logged-in Members (4), and Queue Status (Logged In). Below this, a section titled 'My Queues' contains a table with columns for Queue Name, Predicted Waiting Time, Callers Waiting, Logged-in Members, and Queue Status. The table lists three queues: Support, Marketing, and Careers.

	Predicted Waiting Time	Callers Waiting	Logged-in Members	Queue Status
Support	0:30	1	4	Logged In

	Predicted Waiting Time	Callers Waiting	Logged-in Members	Queue Status
Support	0:30	1	4	Logged In
Marketing	0:00	0	2	Logged In
Careers	0:00	0	5	Logged In

This screen

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

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

18 Settings

There are a number of screens within the CommPortal interface where you can configure the settings for your Metaswitch Networks phone system:

On the bottom panel of the CommPortal screen

- **Personal Details** and **Security** provide options for configuring and changing some of the settings for your account.

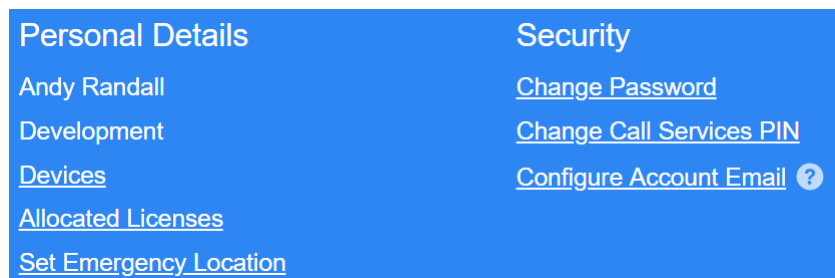
By clicking the following icons on the Your Services panel.

- **Call Settings** allows you to configure your call service options.
- **Message Settings** 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.

18.1 Personal Details and Security

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

Figure 50: Personal Details and Security settings



The page is divided into the following panels.

Personal Details

The Personal Details panel shows you information about your line:

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

- Whether you are an administrator, and if so, for which department.

Devices

The Devices panel shows you the phones and other devices that you currently have configured for your account. If you have a SIP desk phone, you can use the Devices panel to configure settings for it by clicking on *set keys* next to its number. This will launch the Phone Configurator, which is described in Chapter 20.

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

Allocated Licenses

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

Emergency Location

If your service provider allows you to use your phone in more than one location, the *Set Emergency Location* link 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 password, Call Services PIN or Voicemail PIN.

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

To change your CommPortal password, follow these steps:

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

You have two different PINs.

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

To change either of these PINs, follow these steps:

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

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

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

18.2 Call Settings

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

Figure 51: Call Settings tab

Call Settings Apply Cancel

▼ **General**

Caller transfer is not available as no operator number has been set for your business group.

Outgoing caller ID: (504) 203 7507 - Direct Dial

Withhold caller

Provide caller ID for incoming calls

Provide caller name for incoming calls

▼ **Call Forwarding**

Ask me for a forwarding number each time I turn on forwarding from my phone using an access code:

Busy Forwarding

▼ **Call Blocking**

Choose which types of phone numbers should be blocked.

Local

National and Mobile

International

Premium Rate

Operator

Directory

Access Codes

Access codes that change configuration

Restore all defaults ?

- The General panel enables you to configure call settings, including caller ID options and, if you are allowed to do so:
 - Change your individual call transfer number. This is the transfer number offered to callers who reach your mailbox and want to try you on another number rather than leave you a message.
 - Set your Outgoing Caller ID as either your Business Group Line's Directory Number (DN) or your Calling Party Number.
- 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*.

You may also be able to see a **Restore defaults** button – click this to revert your account to use the call blocking configured by your service provider.

You may also see the following panels on this screen if you have access to these services.

Call Jump

You can use the Call Jump feature to transfer an established call made or received using your primary phone number to a different telephone number.

The Call Jump panel allows you to set two telephone numbers that will correspond to two hot key sequences that you can press to transfer incoming calls when using Call Jump.

- The Alternate number will usually be an alternative landline number.

- The Wireless number will be a mobile device.

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.

18.3 Message Settings

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

Figure 52: Settings – Messages tab

The screenshot shows the 'Message Settings' interface. At the top right are 'Apply' and 'Cancel' buttons. The 'General' section includes: 'Incoming calls are forwarded to voicemail after 36 seconds', checkboxes for 'Transcribe voicemails in your inbox', 'Enable live screening', 'Enable video messaging', and 'Forward messages and faxes as emails'. The 'Forward to:' section lists 'andy.randall@domain.com' and 'mike.birmingham@domain.com' with checkboxes for 'Voicemails' and 'Faxes'. Other options include 'Leave original in Inbox' and 'Include action links in emails'. The 'Mailbox Access' section includes checkboxes for 'Skip PIN', 'Fast Login', 'Auto-play voicemail', 'Auto-play Fax', 'Use short prompts', and 'Play greeting warning'. It also has dropdowns for 'Voicemail playback' (Message only) and 'Message playback order' (Oldest first). The 'Voicemail Greeting' section includes a dropdown for 'Use the greeting:' (Extended Absence * (video)) and a 'more options' section with a checkbox for 'Use a temporary greeting' (Personal Greeting 4 *), a date picker for 'Use this greeting until:' (17 13 on 12/28/2014), and a dropdown for 'On expiry:' (Send a notification).

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

General

You can use the General panel to do the following.

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

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

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

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

Mailbox Access

You can use the Mailbox Access panel to:

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

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

Voicemail Greeting

You can use the Voicemail Greeting panel to:

- select your default greeting
- specify when alternative greetings should be used and the behavior when a greeting expires

- record or upload additional audio greetings, for example greetings to be used out-of-hours or during an extended absence, or when the caller is in the same business group as you
- override your default greeting with a temporary greeting for a defined period of time.

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

18.4 Account Codes

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

Figure 53: Settings – Account Codes tab

Account Codes

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

Account Code Options

Personal	Business Group
2222	Personal
4444	Family

Call types requiring an account code

- Local
- Regional
- National
- International
- Premium Rate
- Use validated account codes
- Operator
- Directory
- Carrier Dialed
- Local Business Group
- Other Business Group

Account code length:

Max incorrect attempts before account is blocked:

[Unblock Account Codes](#)

For more details on the account codes services, see section 9.4 or speak to your administrator.

18.4.1 Account code options

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

Figure 54: Account Code Options

Account Code Options

Call types requiring an account code

- Local
- Regional
- National
- International
- Premium Rate
- Use validated account codes
- Operator
- Directory
- Carrier Dialed
- Local Business Group
- Other Business Group

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.

18.4.2 Business account codes

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

Figure 55: Business account codes

The screenshot shows the 'Account Codes' configuration page. At the top, there are two tabs: 'Personal' and 'Business Group', with 'Business Group' selected. Below the tabs, there are two columns of call types requiring an account code. The left column includes: Local (unchecked), Regional (unchecked), National (checked), International (checked), Premium Rate (checked), and Use validated account codes (checked). The right column includes: Operator (checked), Directory (checked), Carrier Dialed (checked), Local Business Group (unchecked), and Other Business Group (checked). Below these are two input fields: 'Account code length' with the value '4' and 'Max incorrect attempts before account is blocked' with the value '5'. At the bottom left, there is a button labeled 'Unblock Account Codes'. On the right side of the page, there is a table with two columns: 'Code' and 'Group'. The table contains three rows: '0123' for 'Sales', '1234' for 'Support', and '2345' for 'Marketing'.

18.4.3 Personal account codes

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

Figure 56: Personal account codes

The screenshot shows the 'Personal Account Codes' configuration page. At the top, there are three buttons: 'Edit Personal Account Codes', 'Apply', and 'Cancel'. Below the buttons, there is a text label 'require a code before dialing.' Below this is a tabbed interface with two tabs: 'Personal' (selected) and 'Business Group'. Below the tabs, there is a message: 'You have no personal account codes assigned.'

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

Figure 57: Editing personal account codes

Manage Assigned Account Codes

Account code: 12345678 Description: Account Code 1 Add

You have no account codes assigned.

Clear List OK 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*.

To delete an account code, follow these steps:

1. Click on the trash 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*.

18.4.4 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* at the bottom of the Account Codes screen in Figure 53: Settings – Account Codes tab.

For more details on Account Codes, see Section 9.4 or speak to your administrator.

18.5 Notifications

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

Figure 58: Settings – Notifications tab

Notifications Clear List New Entry Apply Cancel

▾ Message Waiting Indicator

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 type="checkbox"/>	<input checked="" type="checkbox"/>	
(987) 854 3210	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
(648) 952 1858	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
(357) 895 1238	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
(785) 412 3898	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

▾ Email

▾ Pager

▾ Outdial

▾ Override

Message Waiting Indicator

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

To 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*.

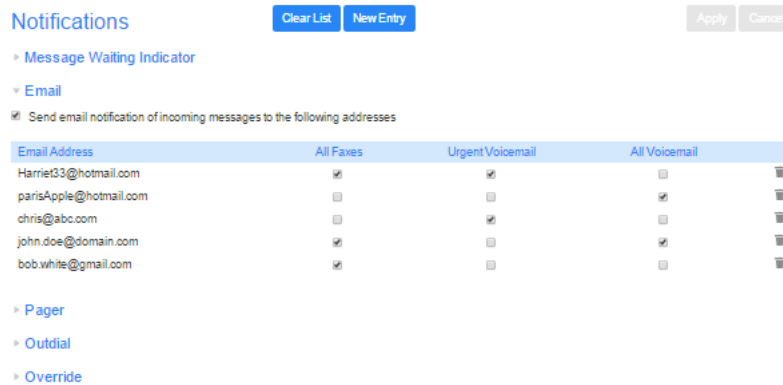
To have only urgent new voice messages activate your phone's messages indicator, follow these steps:

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

Email notifications

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

Figure 59: 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*.

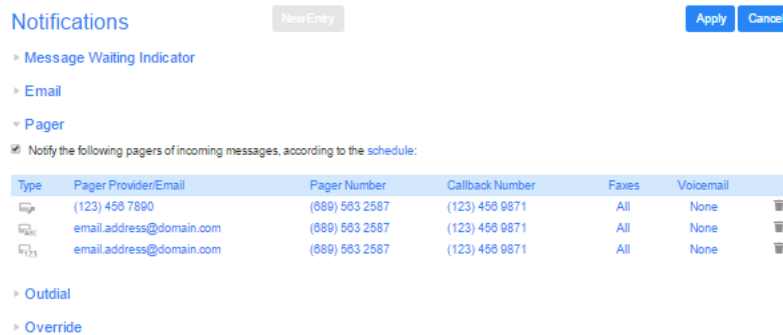
To delete all email addresses from this list, follow these steps:

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

Pager notifications

Expand **Pager** to configure 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 60: Pager Notifications



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*. (This option will be grayed out if you have already added the permitted number of pagers).
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*.

Outdial notifications

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

Figure 61: Outdial Notifications

Notifications Apply Cancel

- Message Waiting Indicator
- Email
- Pager
- Outdial

Send outdial notification of incoming messages, according to the [schedule](#):

Specify the phone number to send outdial notifications to:

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

- Urgent Voicemail
- All Voicemail
- All Faxes

Set the delay between receiving the message and receiving the notification for the message:

hours ▼ Delay for normal messages

hours ▼ Delay for urgent messages

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

Number of outdial retry attempts

Delay between retries (minutes)

- Stop retries when you answer the call
- Stop retries only when you access your voicemail

[Override](#)

On this screen, you can:

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

You can also

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

Override notifications

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

Figure 62: Notification settings – Override tab

The screenshot shows the 'Override' tab selected in the 'Notifications' settings. The 'Override' checkbox is checked. The 'While the override profile is active, notify me by:' dropdown is set to 'Pager'. The 'Expiry date' is set to 04/21/2017. The 'Pager gateway type' is 'Telephone' and the 'Provider' is 'CDMA - PCSPageNET'. The 'Telephone number people call when sending you a page:' is '1 (888) 800 0369'. The 'Pager number' and 'PIN' fields are empty. Under 'Choose the incoming messages that should be notified by pager:', 'Urgent Voicemail', 'All Voicemail', and 'All Faxes' are all selected. For 'Set the delay between receiving the message and receiving the notification for the message:', 'Immediate' is selected for both 'normal messages' and 'urgent messages'. For 'Set a retry limit and delay between retry attempts until the message is marked as read:', '0' is selected for 'Number of pager retry attempts' and '15' is selected for 'Delay between retries (minutes)'.

Using the Override tab, you can

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

You can also

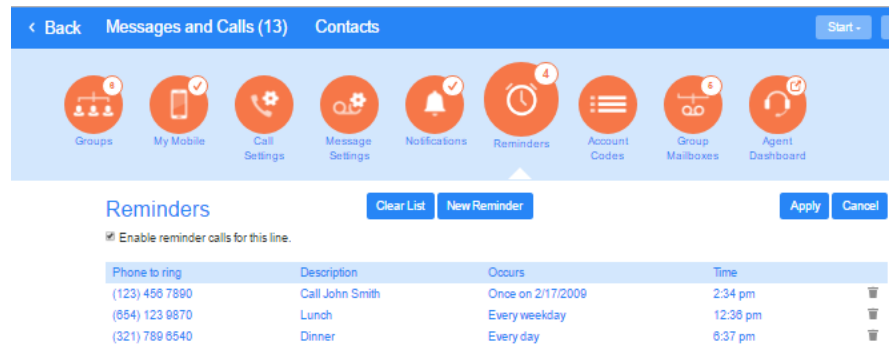
- configure a schedule containing periods when outdial notifications are sent – during inactive periods (for example overnight) any unheard message will still activate the MWI, but the outdial notification is postponed until the next active period in the schedule.
- control the delay between receiving a message and sending out a notification

- control how many times, and at what interval, the system will retry a call if the notification is not acknowledged
- control what you have to do to acknowledge the notification: simply answer the outdial call, or proceed to access their voicemail. The second option prevents a notification being lost because the call was picked up by an answering machine or by someone else.

18.6 Reminders

The Reminders screen lets you set up reminder calls.

Figure 63: CommPortal Reminders page



18.6.1 Adding reminders

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

Figure 64: Adding a new reminder

New Reminder

Configuration

Description:

Phone number to notify:

Occurs:

Time: :

Date: / /

Times are relative to the timezone in which your line is registered.

Play/Record

1. Enter a description of the reminder.
2. Select the phone number on which you will receive the reminder call.
3. Select whether you want a one-off or recurring reminder using the drop-down.
4. Enter the date (for one-off reminders) and time you would like the reminder call using the *Time* boxes and dropdown list.

5. Click on Play/Record to record and then playback your reminder message.
6. Click on *Add*.
7. Click on *Apply*.

18.6.2 Deleting reminders

To delete a reminder, you use the Reminders list:

To delete a single reminder, follow these steps:

1. Click on the trash icon to the right of the reminder in the list.
2. Click on *Apply*.

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

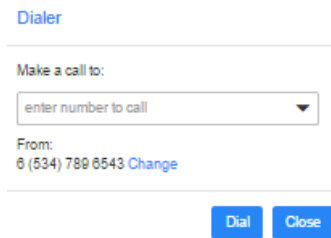
1. Click on *Clear List*.
2. Click on *Apply*.

19 Click To Dial

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

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

Figure 65: Click To Dial Dialer



Dialer

Make a call to:

enter number to call

From:
6 (534) 789 8543 Change

Dial Close

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

20 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.

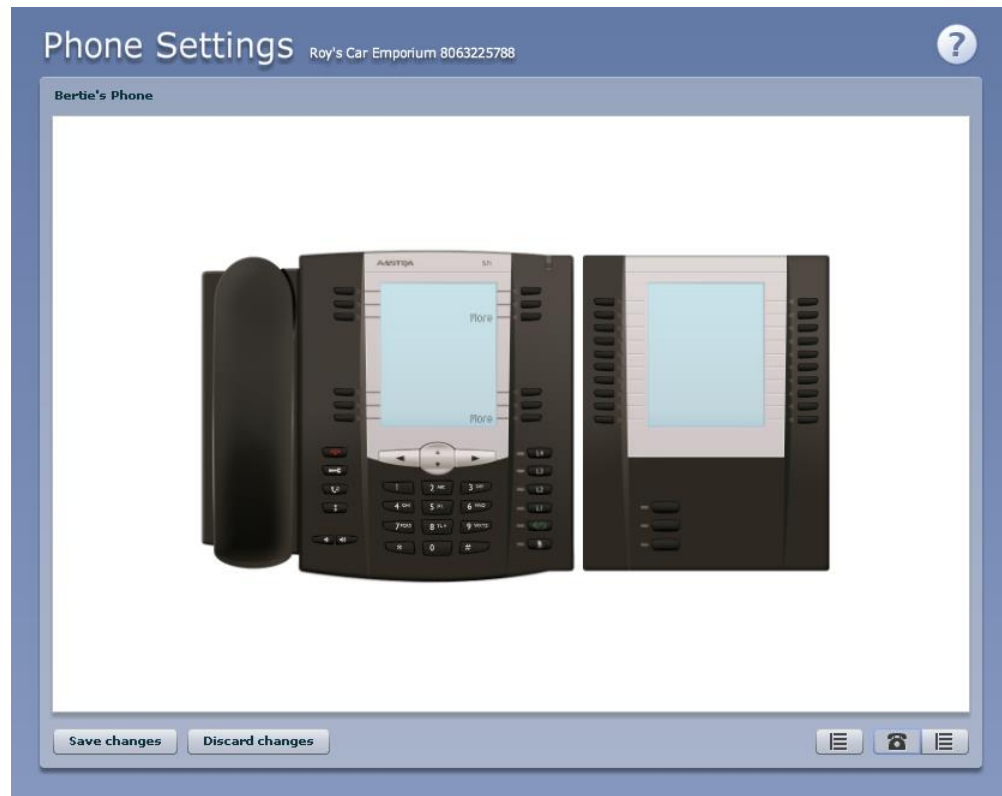
This launches a new browser window for the Phone Configurator.

20.1 Using the Phone Configurator's graphical view (Built-In phones)

You must have Adobe Flash Player version 9 or later installed to use the Phone Configurator.

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

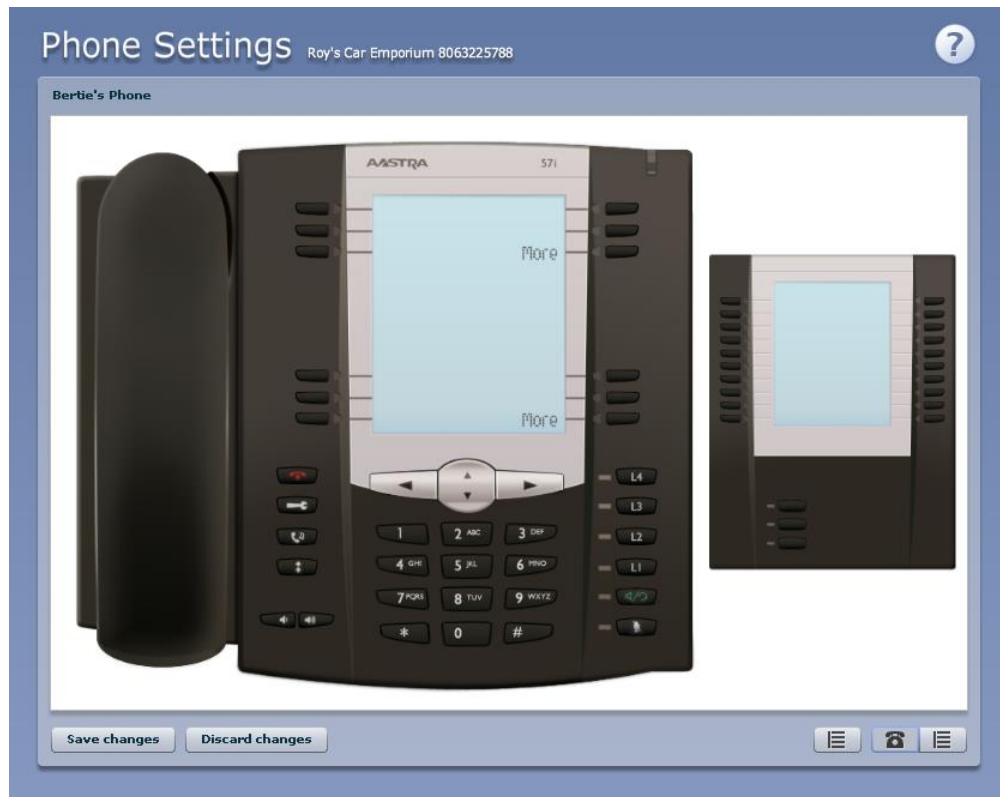
Figure 66: Phone Configurator graphical view



The examples shown in this document show an Aastra 57i phone with a 560M 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:

Figure 67: Phone Configurator – Phone and Sidecar view



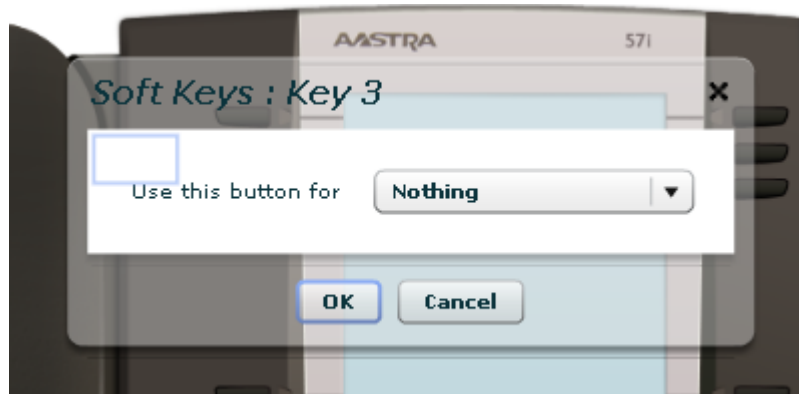
You can see whether you can modify a key by hovering your mouse over the key. If the key glows blue you can configure it. If it glows red, you cannot.

Figure 68: Configurable key



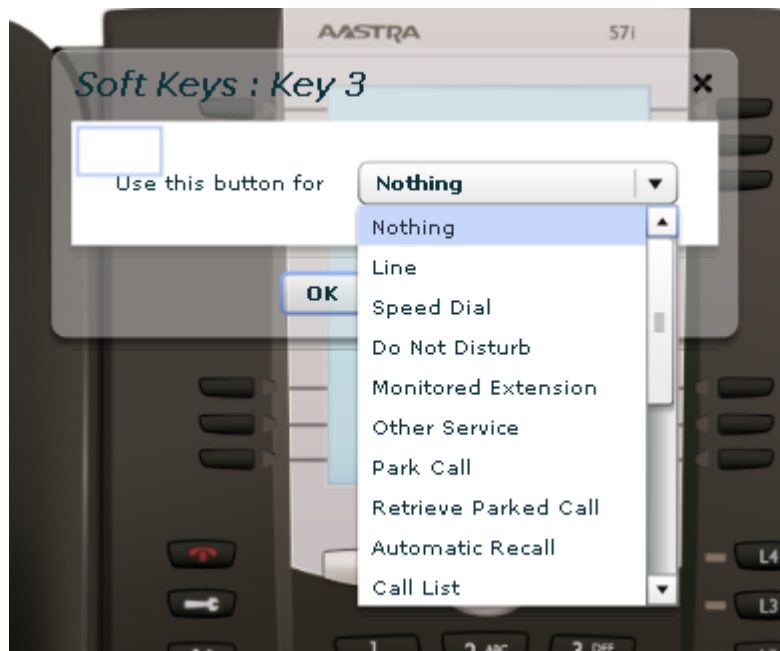
To select a key, click on it. This will launch a pop-up allowing you to configure the key:

Figure 69: Configuring a key



Use the drop-down list to select the operation you'd like that key to perform:

Figure 70: Configuring a key



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 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 6.8.
- 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 6.6.
- Retrieve Parked Call – this is used to retrieve parked calls as described in Section 6.7.
- 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.
- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.
- Trace Call – this configures the key as a speed dial to call the Call Trace service.
- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.
- Group Pickup – this configures the key as a speed dial for the Group Pickup service, described in Section 16.2.2.
- 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.

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.

Figure 71: Configured key with label



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.

20.1.1 Pages of keys (built-in phones)


Some phones, like the Aastra 5xi series, support a series of pages of keys, which you can scroll through using the *More* key.

To access these pages of keys, click on the *More* key on the phone picture:

Figure 72: Page of Keys



20.2 Table view (built-in phones)

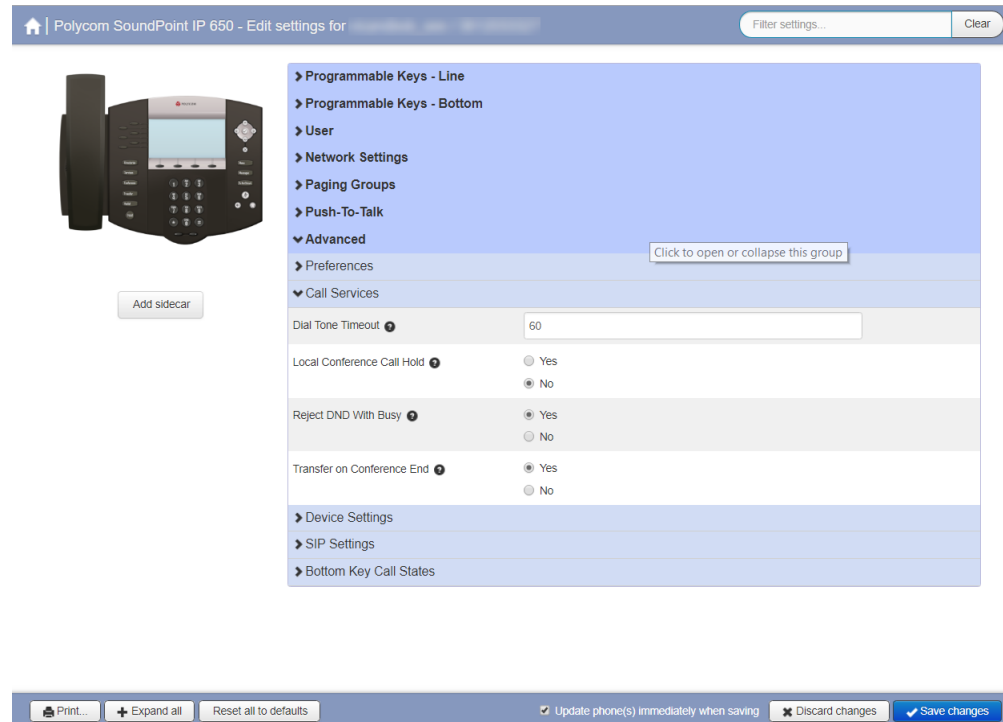
There is a more advanced and powerful interface for configuring your phone, which can be accessed by clicking on the table view icon at the bottom right of the screen: .

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 Networks Hosted PBX Administrator Guide*.

20.3 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 73: Modifying a phone profile



The examples shown in this document show a Polycom SoundPoint IP650. Your phone model may differ from the one shown.

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

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

- None – this is used when a key is not assigned a function.
- Line – this key is used for your phone line. Pressing this key will cause the phone to go off-hook and ask you for digits to dial. When calls come into that phone line, this key can be used to answer those calls.
- Speed Dial – this configures the key as a speed dial 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 6.8.
- 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 6.6.
- Retrieve Parked Call – this is used to retrieve parked calls as described in Section 6.7.
- Automatic Recall – this sets up the key as a speed dial to call the Automatic Recall access code.
- Call List – this configures 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.
- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.
- Trace Call – this configures the key as a speed dial to call the Call Trace service.
- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.

- Group Pickup – this configures the key as a speed dial for the Group Pickup service, described in Section 16.2.2.
- 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, you should save your changes.

- If your system supports the feature, you will see an **Update phone(s) immediately when saving** option on the bottom of the UI. Tick this option if you want the changes to be sent to the phone immediately when you select *Save changes*, rather than waiting for it to be rebooted.
- Click on *Save changes*. Unless you have ticked **Update phone(s) immediately when saving**, changes won't be applied to the phones themselves until they are next rebooted.

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

A Access codes

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

Table 4: Access codes

Cancel Call Waiting	*70
Immediate Call Forwarding Activation	*72
Immediate Call Forwarding Deactivation	*73
Busy Call Forwarding Activation	*90
Busy Call Forwarding Deactivation	*91
No Answer Call Forwarding Activation	*92
No Answer Call Forwarding Deactivation	*93
Deactivation of Immediate/Busy/No Answer Call Forwarding	*94
Park Call	*53
Retrieve Parked Call	*54
Do Not Disturb Activation	*78
Do Not Disturb Deactivation	*79
Automatic Recall	*69
Group Call Pickup	*311
Voicemail	*318

B Quick reference information

Table 5: Quick reference information

Your phone number	
Your extension	
Code to dial an external number	
Access your phone settings online	https://hosted.sp.net/
Conferencing phone number	555-555-9000
Conferencing moderator code	
Conferencing participant code	
Conferencing moderator web access	https://conf.sp.net/
Remote access to call forwarding number	555-555-8000
Your administrator	
Your administrator's phone number	