Hosted VoIP
Phone System

Green Platform

CommPortal

Personal User Guide

Telesystem

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1. Introduction

This manual describes CommPortal, a web interface that allows the users to manage the features of their phone through a website.

1.1. About this Manual

The *Personal CommPortal Guide* is intended to assist you in understanding and managing your Telesystem hosted phone account. This guide is divided into sub sections, as is the user portal itself. You may find that it is best to keep this guide in its electronic form to search desired topics in an easier manner.

The CommPortal is a web interface that allows you to modify your phone or virtual office account settings from any web-enabled device. This guide will assist you in managing your account. The things you can do via your personal portal include, but are not limited to:

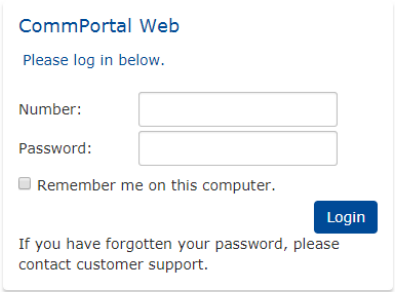
- Viewing, forwarding, and listening to voicemails (see section 3).
- Modifying voicemail notification settings (see section 5.3).
- Changing available, programmable keys on your phone (see section 6).
- Modifying call forwarding settings (see section 2).

Please note that the features described will vary depending on the type of services on your account. If you have any questions concerning your account, please speak with your system administrator or contact Telesystem.

Finally, the screenshots and examples in this guide may show portal colors that differ from your login, however the way all changes are done will be the same.

1.2 Account Access

To access the CommPortal, point any browser to https://pbx.telesystem.us/commportal/ then enter your credentials.



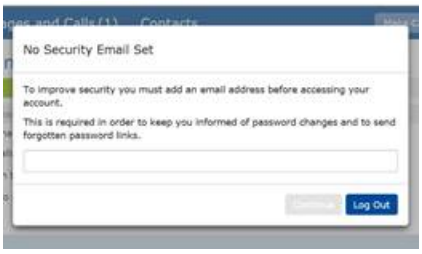
Number is the ten digit account number assigned to your own phone account (known as the DID or direct inward dial number).

Password is your CommPortal (and application) password.

If you do not know your password, please contact your current system administrator or Telesystem to assist.

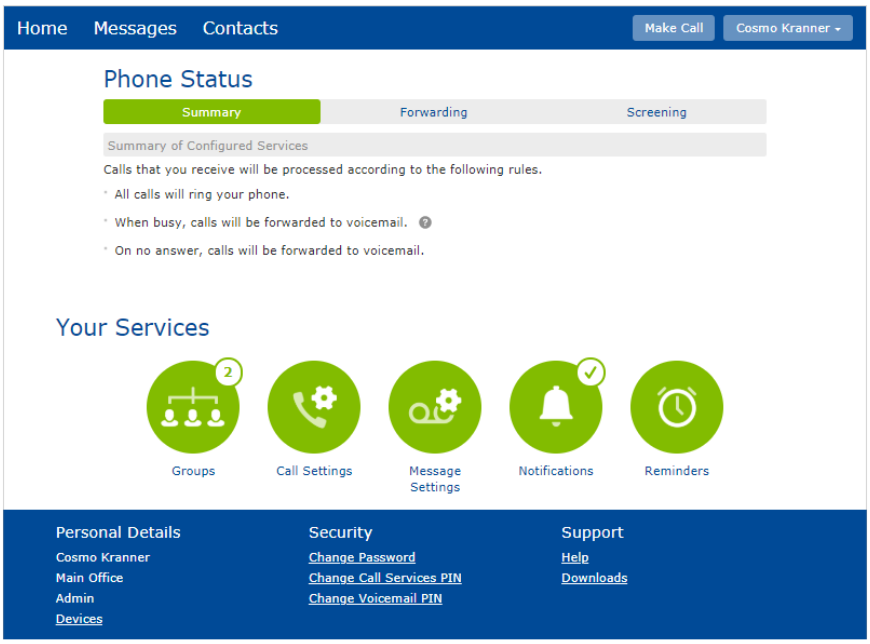
After logging in, please note that if you do not already have a *security email* linked to your account, you will be required to enter one.

If you forget your password in the future, the password reset link will be sent to the email you provide, so be sure to enter a valid email at this step. Only one email address can be entered in as a security email. If you wish for it to go to a group, please contact your email administrator to discuss setting up a distribution list.

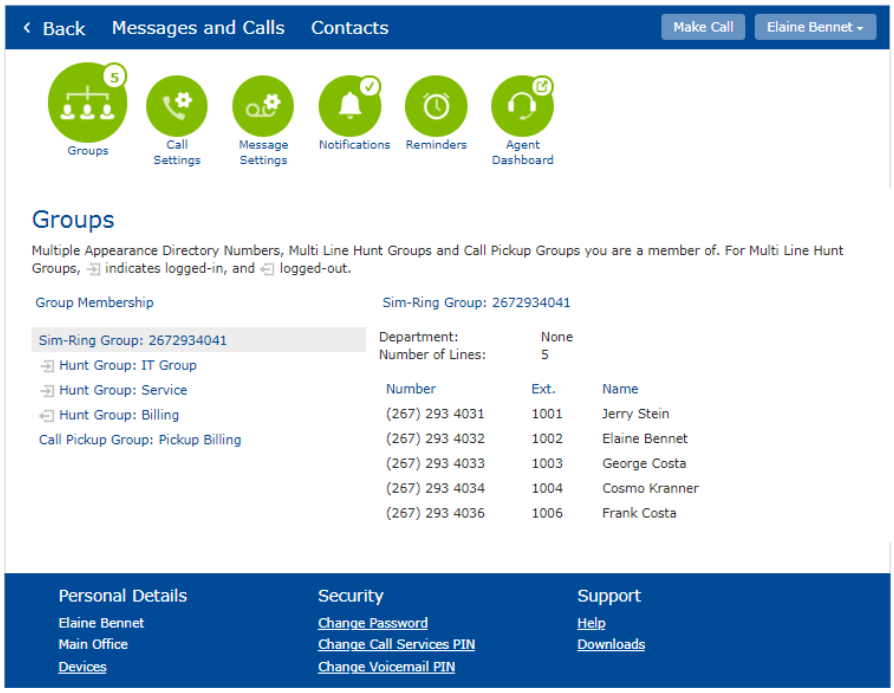


1.3 Navigating the Portal

The User CommPortal is lined with blue toolbars at the top and bottom of the interface. Throughout the navigation of the portal, these remain stable to give you access to all the associated features.

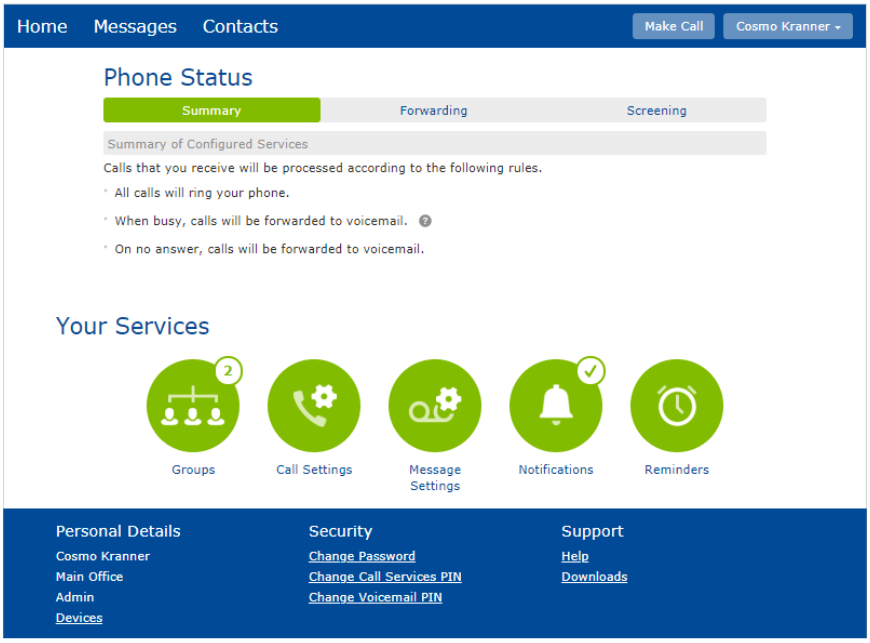


When exploring services other than the Home page, you can use the **< Back** button on the top toolbar to return to Home.


Back
Messages and Calls
Contacts
Make Call
Elaine Bennet
Groups
Call Settings
Message Settings
Notifications
Reminders
Agent Dashboard
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: 2672934041
Hunt Group: IT Group
Hunt Group: Service
Hunt Group: Billing
Call Pickup Group: Pickup Billing
Sim-Ring Group: 2672934041
Department: None
Number of Lines: 5
Number Ext. Name
(267) 293 4031 1001 Jerry Stein
(267) 293 4032 1002 Elaine Bennet
(267) 293 4033 1003 George Costa
(267) 293 4034 1004 Cosmo Kranner
(267) 293 4036 1006 Frank Costa
Personal Details
Elaine Bennet
Main Office
Devices
Security
Change Password
Change Call Services PIN
Change Voicemail PIN
Support
Help
Downloads

1.4 Getting Acquainted

When you have logged into your personal CommPortal, you will see a **Home page**:

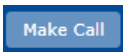


From the home page, you may:

- Make a click-to-dial call (see section 1.5).
- Log out of the portal (see section 1.6).
- Modify all call forwarding associated with your account (see section 2).
- Access the Messages and Contacts sections (see section 3 and 4).
- Modify phone keys (see section 3 and 4).
- Change security settings (see section 7).
- Manage the other primary services for the account (see section 5).
- Access the help section and downloads (see section 8).

Each of these functions are described in the sections that follow.

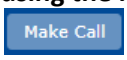
1.5 Make Call

While logged into your personal portal, the 

Make Call button appears on the top right of the screen.

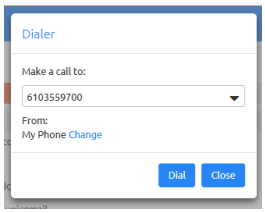
The Make Call button gives access to the “click to dial” feature. This allows you to utilize the portal to dial a phone number for you. This also allows you to use a device besides your desk phone to make the call.

To initiate a call using the Make Call button:

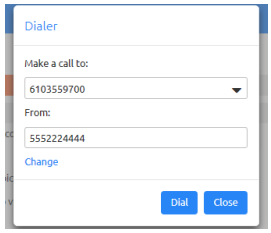
- Click the 

button

- **Enter** the telephone number of the destination you want to dial in the *Make a call to:* field. For example, if you were calling Telesystem at 610-355-9700, that whole telephone number would be placed in the first field as follows:



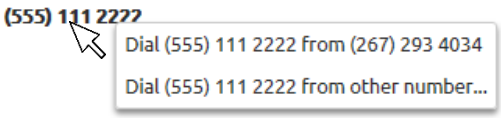
- **Enter** the telephone number of the device you will be using in the *From:* field.
  - To use your desk phone, keep the 'From:' destination 'My Phone' as shown above.
  - To use a different telephony device, such as your cell or home phone, select the Change link and then input the new telephone number of the device you will be using.



- Select the **Dial** button to initiate the call.
- The call will first ring your phone (desk phone or the device you've selected to use to make the call) then after you have answered, it will place the call to the target phone after you have answered.

If you are using a phone other than your primary desk phone, the destination will receive the caller ID information associated with your desk phone instead of the personal caller ID information of the off network device you are using (cell phone, etc.).

The Make Call option also may be initiated at various places in the portal (ex: *Contacts* or the *Missed Calls* sections) by clicking on the call or phone number and choosing one of the dial options.



1.6 Logout

While logged into your personal portal, the name of the user shows top right of the screen.

Click on the name then choose ***logout*** to log out of the portal.

You may also close the browser or after a period of inactivity, you will be logged out automatically.

2. Home Page Call Forwarding

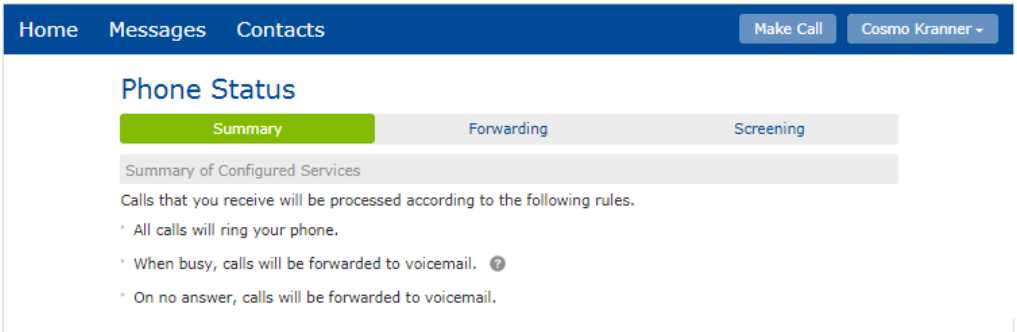
The Home page may be used to configure incoming call services available on your account. The available forwarding varies based on the services tied to your account. The main types of this service are:

- **Basic**
- **Find Me Follow Me**
- **Incoming Call Manager**
- **Business Call Manager**.

Each are described in the following sections.

2.1 Basic

The Basic Call Manager shows a series of three tabs which you can select:



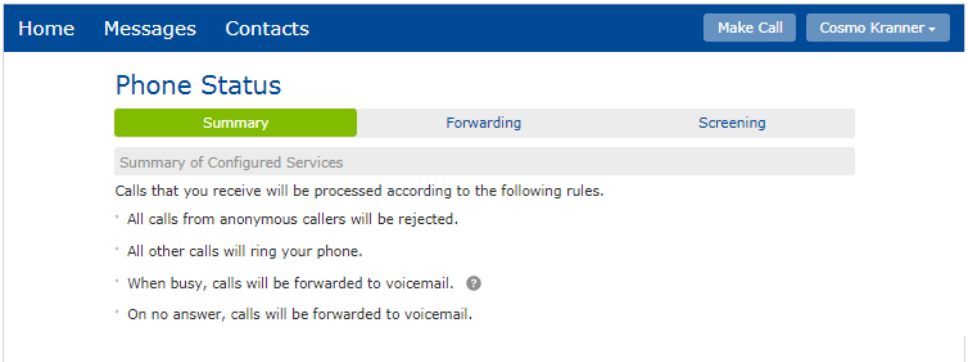
Click the related tab to navigate to it.

- **Summary-** Gives a description of the current settings for incoming calls.
- **Forwarding-** Offers several forwarding settings you may modify.
- **Screening-** Allows you to screen incoming calls.

Each of these sections is described in greater detail below.

2.1.1 Summary (Basic)

The Summary section gives an overview of how the incoming calls are being handled.



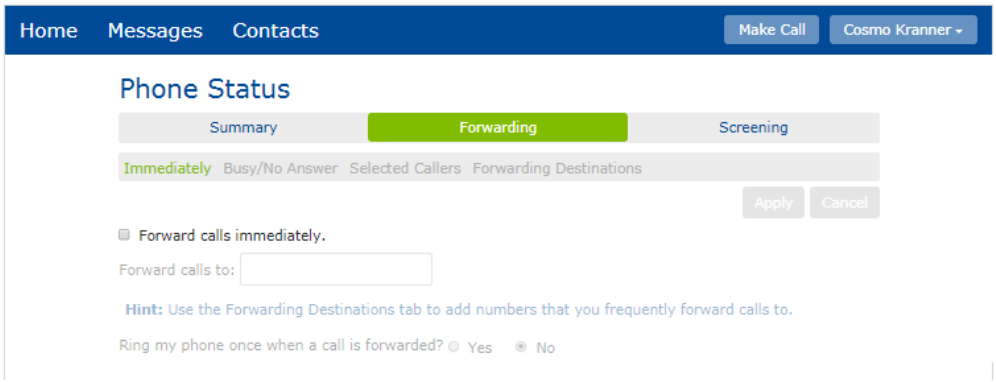
In the example above, the Summary is telling us several things about incoming calls to the selected account:

- All anonymous calls will be rejected.
- All calls (with the above exception) will ring the desk phone.
- If calls are not answered at the desk phone, they will go to its voicemail box.

The Summary page is a brief overview and does not give all the details of each of these features. Each of them will be explained in greater detail in the supporting section.

2.1.2 Forwarding Tab

The Forwarding tab offers several different options for forward calls to your extension or direct dial number.

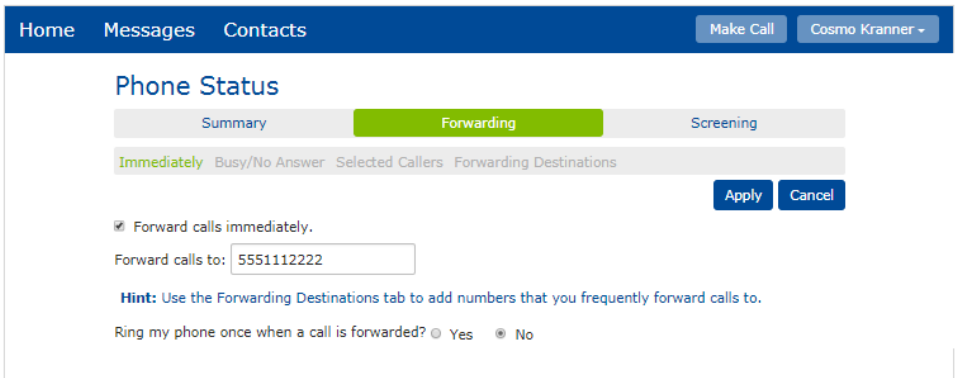


2.1.2.1 Immediately Forwarding

Immediate forwarding forwards incoming calls to a specified destination right away instead of ringing the desk phone first. If a call is not answered at that destination, it will go to that destination's voicemail, etc.

To enable immediate forwarding:

- Navigate to the **Home** screen.
- Select **Forwarding** tab.
- Select the **Immediately** section.
- Checkmark the **'Forward calls immediately'** box.
- **Enter** the ten digit phone number or internal extension to forward calls to in the *Forward calls to:* text box.
- To enable one, short reminder ring on your desk phone each time a call is forwarded to the above destination, choose **Yes** under *Ring my phone once when a call is forwarded*. To keep the desk phone silent when calls are forwarded, choose **No**.
- Click **Apply**.



The picture shown shows immediate forwarding active to 555-111-2222. To turn it off, click the checkmark by '*Forward calls immediately'* then press the Apply button.

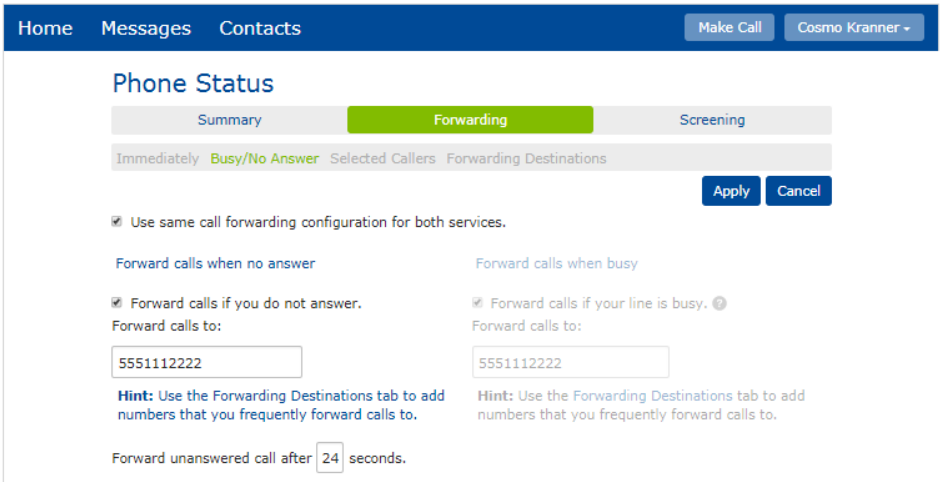
Keep in mind that if engaged, this forwarding may override other forwarding settings such as *Follow Me* (section 2.2).

2.1.2.2 Busy No Answer Forwarding

Busy No Answer Forwarding will forward calls if they are not answered or your phone is busy. This is usually used when one wants to redirect calls to another destination instead of going to their account's voicemail box.

To enable busy or no answer forwarding:

- Navigate to the **Home** screen.
- Select **Forwarding** tab.
- Select **Busy/No Answer** section.
- **Select** the type of forwarding you want to deploy by using the check boxes (example below shows the same configuration for both Busy and No Answer scenarios).
- **Enter** the ten digit phone number or internal extension to forward calls to.
- **Modify** the number of seconds to ring alternate destination (6 seconds per ring).
- Click **Apply** button.



In the example above, if the desk phone is not answered after 24 seconds (approximately 4 rings) or is busy, it will be forwarded to 555-111-2222.

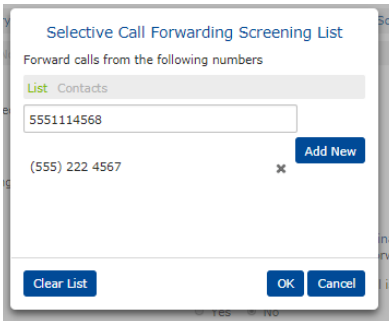
2.1.2.3 Selected Callers Forwarding

The Selected Callers Forwarding will forward only selected callers to a destination of your choice.

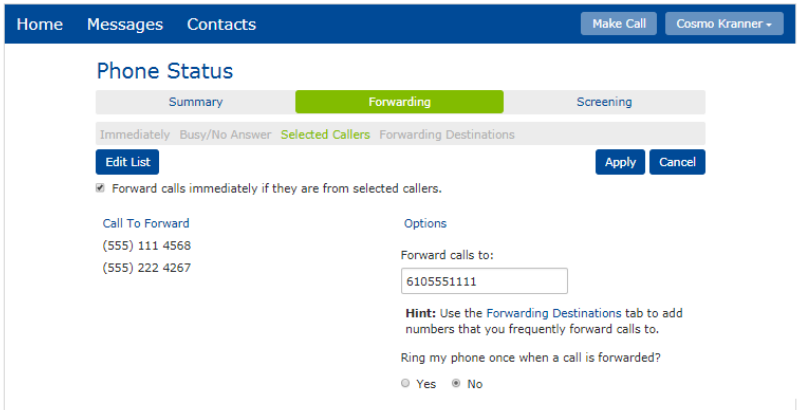
To enable forwarding of selected callers:

- Navigate to the **Home** screen.
- Select **Forwarding** tab.
- Select **Selected Callers** section.
- **Checkmark** the *Forward calls immediately if they are from selected callers* box.

- Click **Edit List** button.
- Choose a Contact from the Contact list or input in the ten digit phone number to forward in the screen that opens:



- Click **Add New**.
- **Repeat** the steps above as necessary to add all telephone numbers.
- Click **OK** button.
- In the **Options** pane, enter the ten digit telephone number to which you want to forward all of these calls.



- To enable one, short reminder ring on your desk phone each time a call is forwarded to the above destination, choose **Yes** under *Ring my phone once when a call is forwarded*. To keep the desk phone silent when calls are forwarded, choose **No**.
- Click **Apply**.

In the example above, if telephone number 555-222-4267 makes a call to this account's extension or direct dial, it will immediately be forwarded to 610-555-1111 instead of ringing the primary phone.

2.1.2.4 Forwarding Destinations

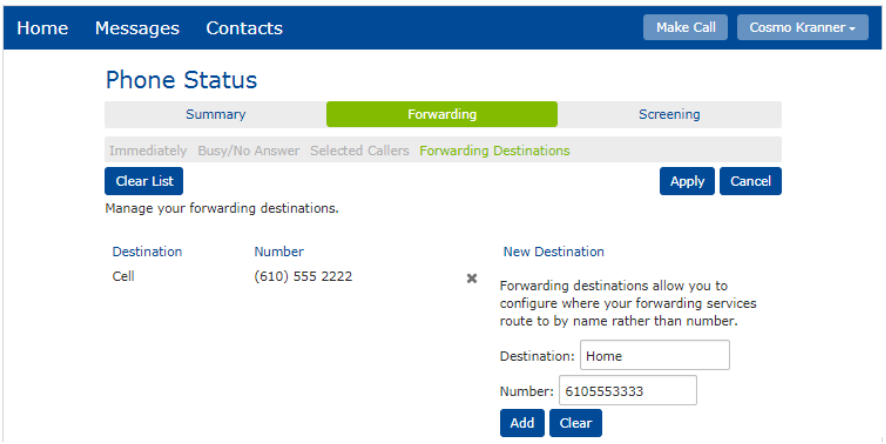
The Forwarding Destinations section allows you to define names for the numbers you want to forward calls, allowing you to quickly and easily select destinations from drop-down menus in the other forwarding sections. For example, if you are often switching between forwarding calls to your cell and home phones, you can preconfigure those destinations in this section to make it easier to select.

To add a forwarding destination to the list:

- Navigate to the **Home** screen.
- Select **Forwarding** tab.
- Select **Forwarding Destinations** section.
- In the *New Destination* pane:

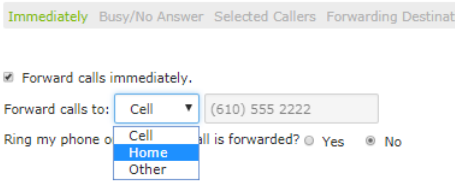
- Enter a label/name in the **Destination** field.
- Enter the ten digit phone number of the destination in the **Number** field.

- Click **Add**.
- Click **Apply**.



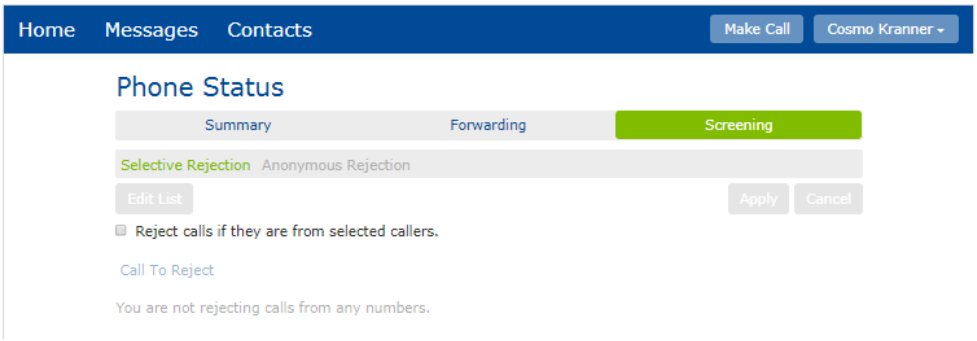
Configured forwarding destinations you have added will appear in the left pane of this section. You may add selections using the steps above, or to delete them click the ✖ icon by the number to remove from the list.

Configured destinations will show in a drop down box to choose from within each forwarding section (example to the right).

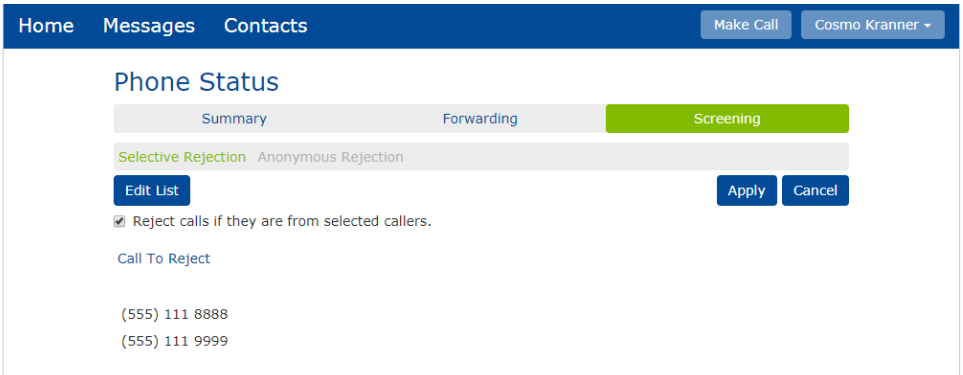


2.1.3 Screening Tab

The Screening section allows you to view and change your call rejection settings.



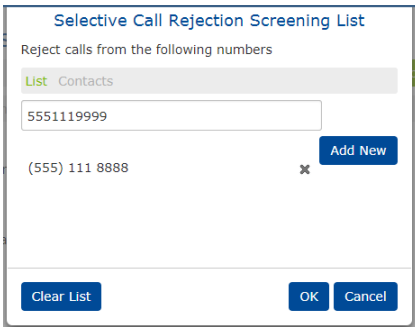
The *Selective Rejection* subsection (shown above) allows you to reject calls from certain numbers. If calling from a rejected number, the caller will hear a system message notifying them that you are not accepting calls from their telephone number.



All calls from the numbers that show up in the *Call To Reject* pane will be rejected.

To add Selective Rejection:

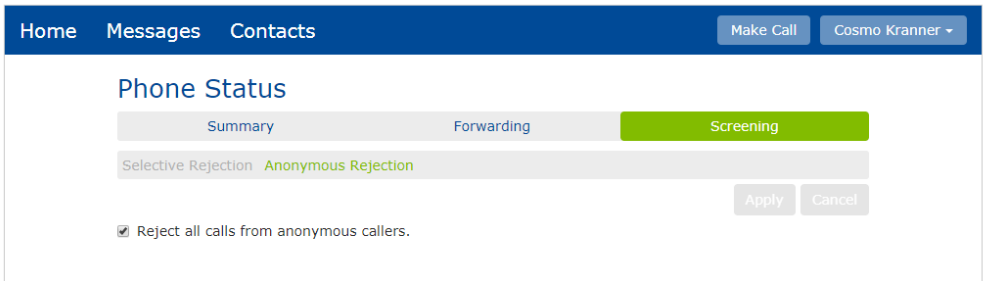
- Navigate to the **Home** screen.
- Select **Screening** tab.
- Select **Selective Rejection** section.
- **Checkmark** the '*Reject calls if they are from selected callers*' box.
- Click **Edit List**.
- **Type** the telephone number in the field provided or choose from existing Contacts.
- Click **Add New**.
- Click **OK** when you are done entering all numbers.
- Click **Apply**.



After the initial setup, the **Edit List** button in this section will allow you to continue to add, change, or remove the rejection numbers.

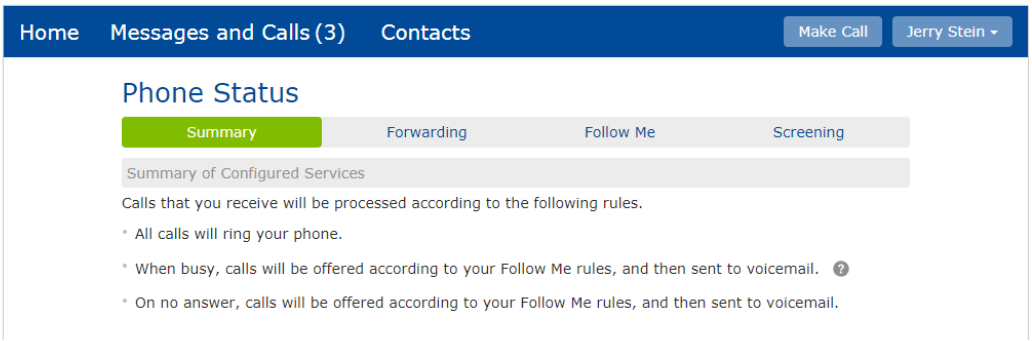
The *Anonymous Rejection* subsection allows you to reject all calls that withhold their caller ID information.

To activate the anonymous rejection feature, place a checkmark in the '*Reject all calls from anonymous callers*' box, then click the **Apply** button. To disable, remove the checkmark then Apply.



2.2 Find Me Follow Me

Users with the Follow Me service will see four tabs the home section for forwarding:



Click the related tab to navigate to it. Several of the tabs on lines with the Follow Me service are also available in the basic call manager service and have been explained previously.

- **Summary-** Gives a description of the current settings for incoming calls (explained in section 2.1.1).
- **Forwarding-** Offers several forwarding settings you may modify (explained in section 2.1.2).
- **Follow Me-** Offers a specific type of forwarding service explained in the sections to follow.
- **Screening-** Allows you to screen incoming calls (explained in section 2.1.3).

The *Follow Me* feature gives its users access to a more advanced forwarding service. This service can forward calls to multiple destinations either simultaneously or in sequence after ringing your desk phone. You may also limit the time of day this forwarding occurs.

When you use the *Follow Me* service, the desk phone will always ring first in its normal fashion. If the phone is not answered, the *Follow Me* rules are engaged instead of the call going to voicemail.

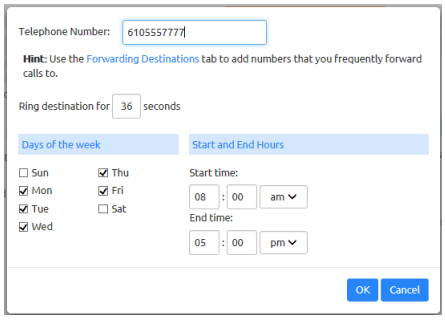
It is important to note that, if enabled, the Immediate Forwarding settings (see section 2.1.2.1) will override the *Follow Me* settings. Please be sure to disable any former *Immediate Forwarding* settings if you intend to use *Follow Me* instead.

2.2.1 Setting up Follow Me Rules

Rule sets must be configured to direct the *Follow* Me feature in how you want to forward calls.

To add a *Follow Me* rule:

- Navigate to the **Home** screen.
- Select **Follow Me** tab.
- **Checkmark** the *Forward calls you receive to one or more alternate destinations* text box.
- Click **Add Rule**.
- Configure the rule:
  - Type in the telephone number of the forwarding destination for the rule in the **Telephone Number** field.



- In the **Ring Destination** field, choose how long to ring that destination (6 seconds per ring)
  - *Note: Be sure that you do not ring your destination longer than its normal ring cycle. For example, since most cell phones ring no more than 4 or 5 times, entering not more than 18 or 24 seconds in this field is advised so that cell voicemail does not pick up.*
- **Modify** the days of the week and hours you want the forwarding service to be active.
- Click the **OK** button.

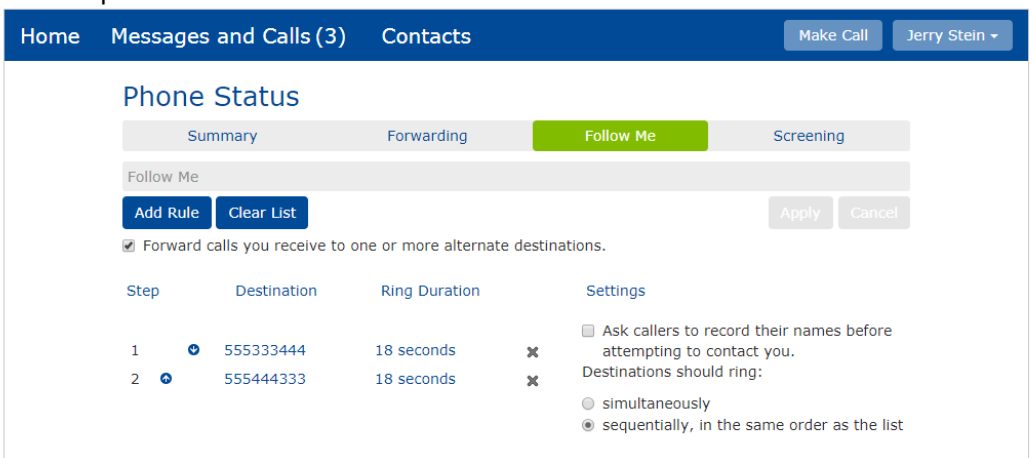
- **Add** other rules if desired.
- Click the **Apply** button.

You may edit rules by clicking on the existing rule in the Follow Me section or delete them by clicking on the ✖ to the right of the rule.

2.2.2 More Information About Follow Me Rules

It is important to note that when *Follow Me* is enabled, the desk phone will ring normally first. If the call is not answered at the desk phone, the *Follow Me* feature will then be engaged instead of voicemail. If the call is not answered at any of the *Follow Me* destinations, it will resolve back to the desk phone's voicemail.

Below is an example of an account that has activated Follow Me:

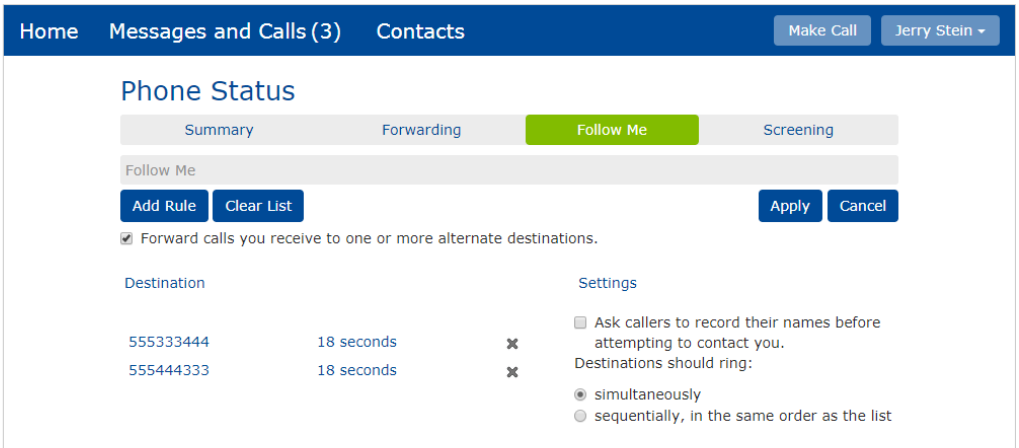


In the example above, the user has added two rules to the *Follow* Me service. When the user's extension or direct number is called directly:

- The **primary desk** phone will ring the normal number of times it is set to do so before going to voicemail.
- If the call is not answered at the desk phone, the call will ring 555-333-4444 for three rings.
- If the call is not answered at that destination, the call rings 555-444-3333 for three rings.
- If the call is not answered at that destination, the call will be sent to the user's **voicemail** that is already setup on their direct dial number.

The caller can abandon the *Follow Me* search at any time and go directly to voicemail by pressing "0".

Choosing the setting to make *Follow Me* ring *simultaneously* (in the right pane) will ring all Follow Me rules simultaneously. The first step will still only ring the desk phone then *Follow Me* rules will be activated when that it not answered.

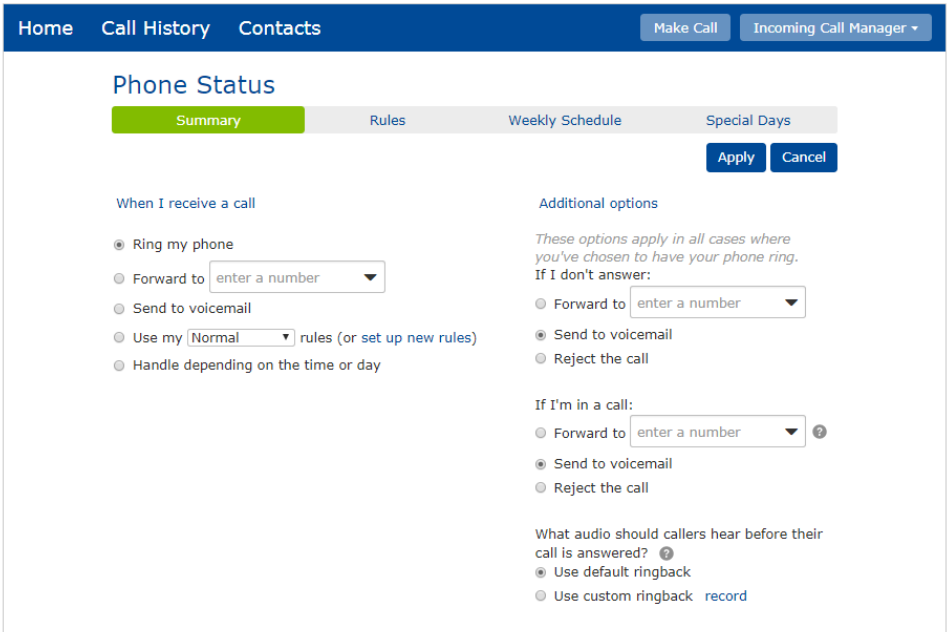


In the alternative example above, when the DID or extension is called directly:

- The **primary desk** phone will ring the normal number of times it is set to do so before going to voicemail.
- If the call is not answered at the desk phone, the call will ring 555-333-4444 and 555-444-3333 simultaneously for three rings.
- If the call is not answered at those destinations, the call will be sent to the user's **voicemail** that is already setup on their direct dial number.

2.3 Incoming Call Manager

Users that have the Incoming Call Manager (ICM) service on their line have access to a robust set of forwarding features on the section's four tabs:



An Incoming Call Manager may be used to direct calls based on time of day, ring several phones at the same time, and even set up special routing for holidays. The ICM handles its incoming calls based on the parameters that have been set up for it.

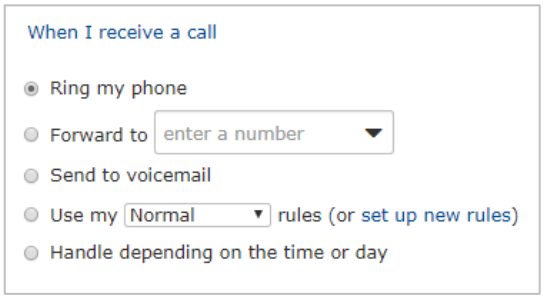
Though users with an ICM can simply ring their phone, incoming calls can also be managed in more complex ways. Each of these is explained in the sections that follow.

2.3.1 Summary (Incoming Call Manager)

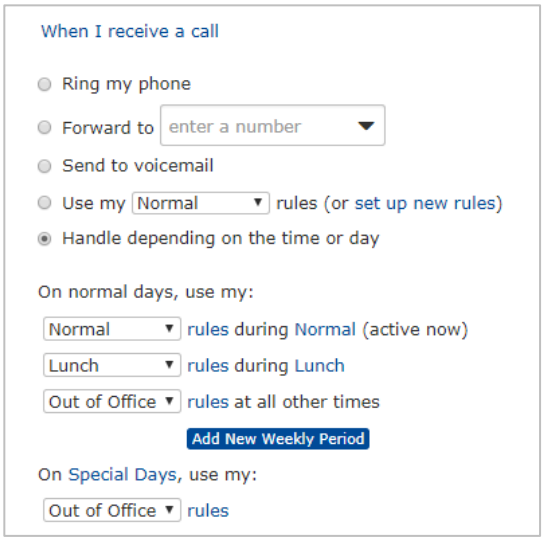
The Summary page shows at a glance how the ICM is managing calls.

The Summary screen is the easiest way to switch between the call treatment for incoming calls. For example, if you are handling your calls based on the time or day but want to simply ring your phone instead, you can make the change quickly and immediately here. Be sure to press **Apply** after making any changes. More information on all the different ways of managing calls follow.

Select one of the three options in *When I Receive a Call* to managed calls as follows:



- **Ring my phone:** ring the primary phone assigned to the account (if any)
- **Forward to:** send all calls directly to an alternate phone number or extension
- **Send to voicemail:** send all calls directly to the account's voicemail box
- **Use my xxx Rules:** utilize one rule that rings one or more phones when incoming calls are received.
- **Handle depending on the Time or Day:** handle calls based on a schedule (see section



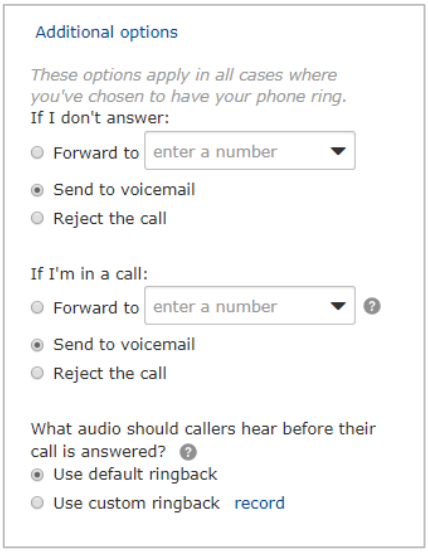
If you have chosen to use the *Handle depending on time or day* option, you can allocate a specific set of rules to each scheduled period (see more on rules and schedules in the sections that follow.)

Simply use the drop down boxes by the name of the scheduled time and allocate an appropriate rule before clicking Apply.

Please note that the Rules and Time of Day options may not appear if nothing has yet been set up in the Rules and Weekly Schedule sections.

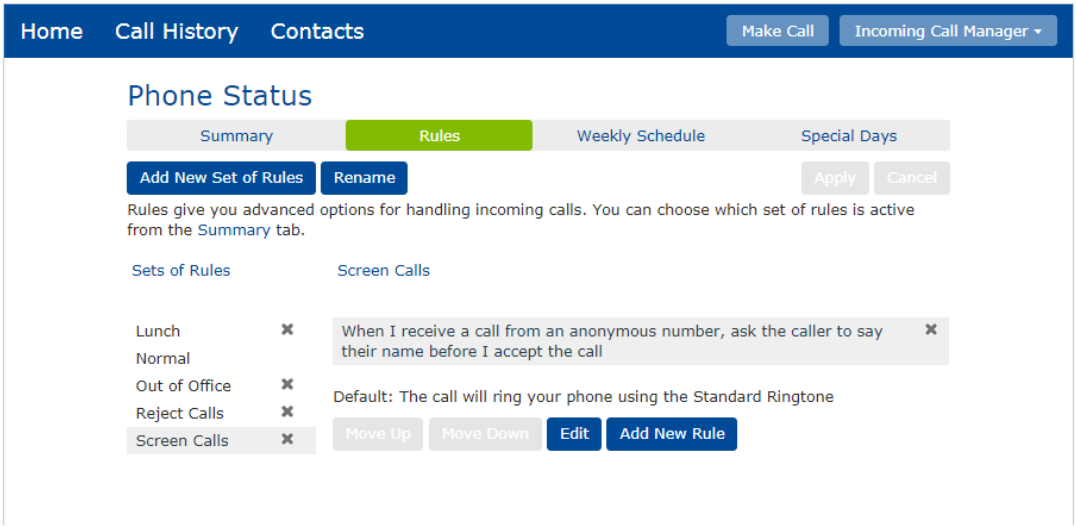
If you have chosen to ring your phone in any scenario, you may manage *Additional Options* as follows:

- **If I don't answer:** If you receive a call that you do not answer, you can forward the call to an alternate number, to voicemail (default), or reject it completely using these options.
- **If I'm in a call:** If you receive a call but all your lines are in use (busy), you can forward the call to an alternate number, to voicemail (default), or reject it completely using these options.
- **What audio should callers hear before their call is answered:** the default ringback allows the caller to hear that the phone is ringing until you answer it. Alternately, you can upload a custom greeting or ringback for the caller to hear instead by choosing the second option then clicking *Record*.
    - When the *record* option is selected, you can record a greeting to play as the ringback if you have a microphone attached to your computer. Alternately, you can upload your own wav file to serve as the ringback.



2.3.2 Rules

The Rules section allows you to configure call treatment for incoming calls. All available rules are shown in the left pane and the summary of what the selected rule does appears in the right pane.



To add a new rule:

- Navigate to the **Home** screen
- Select **Rules** tab
- Click **Add New Set of Rules**
- **Enter** a name for the new rule then click **OK**

To delete an existing rule

- Navigate to the **Home** screen
- Select **Rules** tab
- Click the X to the right of the rule you want to delete
- Click **Apply**

To edit an existing rule

- Navigate to the **Home** screen
- Select **Rules** tab
- **Select** on the rule to modify then click **Edit**
- **Modify** the rule as needed then click **Finish**

See section 2.3.2.1 for details on each of the rule types.

2.3.2.1 Types of Rules

While editing rules, the following types are available:

- **Ring my phone using…**
  If a desk or soft phone is assigned to the account, this option will ring that primary phone when receiving incoming calls. You may choose from several ringtones for this option.

- **Forward to..**
  Forward all incoming calls to an alternate destination. Enter a valid ten digit phone number or an internal extension into this field.

- **Send to voicemail**
  Send all incoming calls directly to a voicemail box associated with the account.

- **Play a reject message and reject the call**
  Reject the incoming caller completely by playing a rejection message.

- **Ask the caller to say their name before I accept the call**
  Requires that the caller records their name. When you answer, the system will play their name and will prompt you to accept or reject the incoming call by pressing a button on your phone.

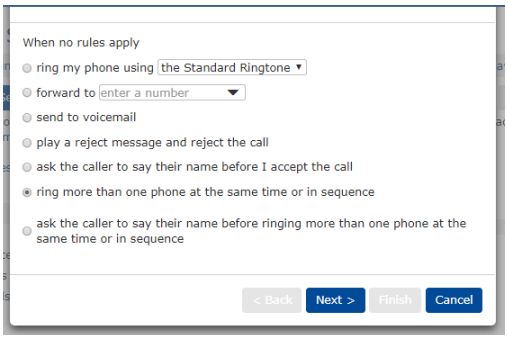
- **Ring more than one phone at the same time or in sequence**
  This option can ring several phones simultaneously or in sequence. See example below.

- **Ask the caller to say their name before ringing more than one phone at the same time or in sequence**
  Ring several phones simultaneously or in sequence after the caller records their name. When any of the ringing destinations answer, the system will play their name and will prompt you to accept or reject the incoming call by pressing a button on your phone.

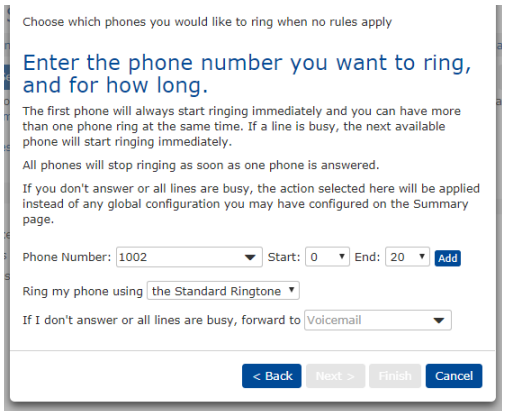
If you have chosen to ring more than one phone at the same time or in sequence, there are several additional steps necessary to finish the configuration.

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

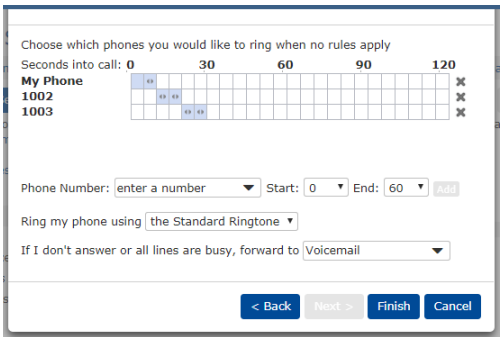
- Navigate to the **Home** screen
- Select **Rules** tab
- **Select** on the rule to modify then click **Edit**
- Choose Ring more than one phone at the same time or in sequence then click **Next**



- Enter or modify the lines to ring**:**
  - Add a new phone number or extension by typing it into the Phone Number field, entering the start and end ringtime, then click **Add.** Repeat as necessary.



- Once you have the ringing destinations entered, the arrows may be dragged to add or remove ringing time. Each square is approximately one ring. Lines may ring simultaneously or sequentially (pictured). Lines can be removed by clicking the X to the right of the line.



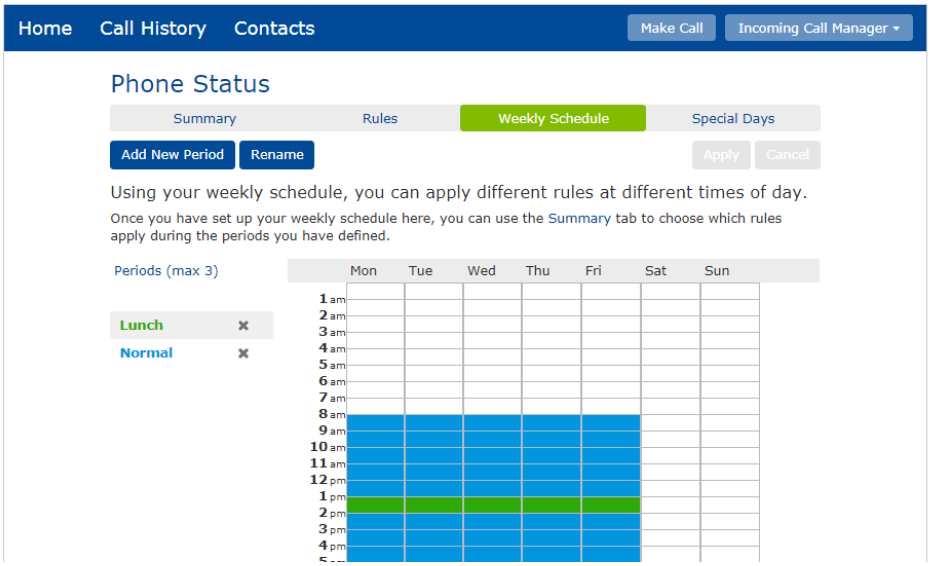
- Choose what should happen if none of the destinations answer the call by filling in *If I don't answer or all lines are busy*. This is set to go to your voicemail by default, but if it should forward back to the main line or to your cell, enter that instead.
- Click **Finish** then **Apply**

It is important to note that the ICM will <u>ignore</u> personal forwarding rules set by individuals. For example, if person A, B, and C are in a simultaneous ICM ring group, but person B sets their phone to forward to their cell phone for the day, the ICM will ignore their rule. Any calls *directly* to person B's extension or direct dial number will follow their rules and ring the cell phone. Any call *through the ICM* will ring their desk phone as normal. The exception to this is Do Not Disturb. The ICM will honor the DND feature if engaged on one or more individual's phones in the ring group.

2.3.3 Weekly Schedule

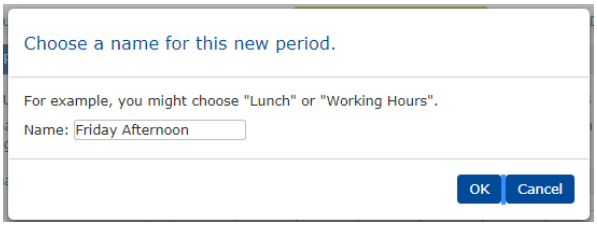
The Weekly Schedule section allows you to configure call treatment for incoming calls based on the time of day or day of the week it is.

Each schedule may have up to three outlined periods in addition to the white space which is considered "all other times".



To add a new period:

- Navigate to the **Home** screen
- Select **Weekly Schedule** tab
- Click **Add New Period**
- **Enter** a name for the new period
- Click **OK**
- Click **Apply**



To delete an existing period:

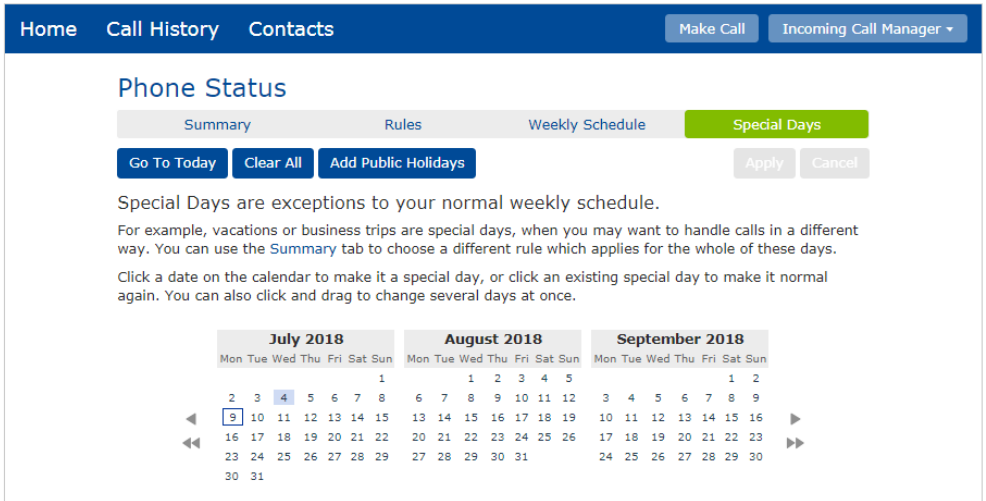
- Navigate to the **Home** screen
- Select **Weekly Schedule** tab
- Click the trash icon to the right of the period you want to delete
- Click **Apply**

To allocate times associated with a period:

- Navigate to the **Home** screen
- Select **Weekly Schedule** tab
- **Select** the period you wish to allocate
- **Click** on the associated time square in the schedule. To see 15 minute increments, click the "zoom in" link below the schedule.
- Click **Apply**

2.3.4 Special Days

The Special Days section allows you to preconfigure exceptions to your weekly schedule. This is useful, for example, when there is an upcoming holiday or vacation in which you want to handle calls differently.



To add a special day:

- Navigate to the **Home** screen
- Select **Special Days** tab
- Use the calendar to find the correct date(s) then **click on the date** to shade it in. Alternately, you may Add Public Holidays using the top bar button.
- Click **Apply**

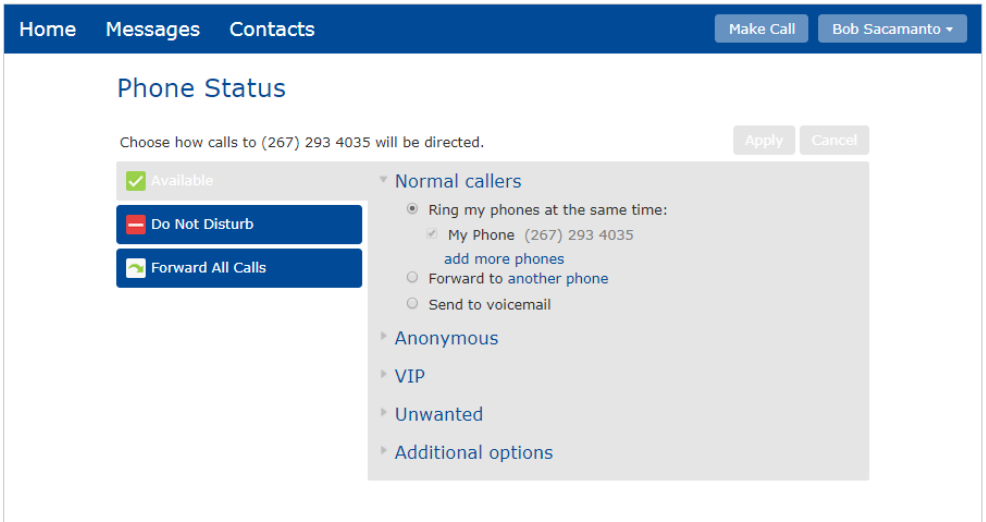
To remove a special day:

- Navigate to the **Home** screen
- Select **Special Days** tab
- Use the calendar to find the correct date(s) then **click on the date** to un-shade it
- Click **Apply**

NOTE: Shaded days are considered a special day for that full, 24 hour period and will override the weekly schedule accordingly. Remember to allocate the appropriate treatment for a special day in the Summary section (see section 2.3.1).

2.4 Business Call Manager

Users with the Business Call Manager service will have access to the following Call Manager section and features:



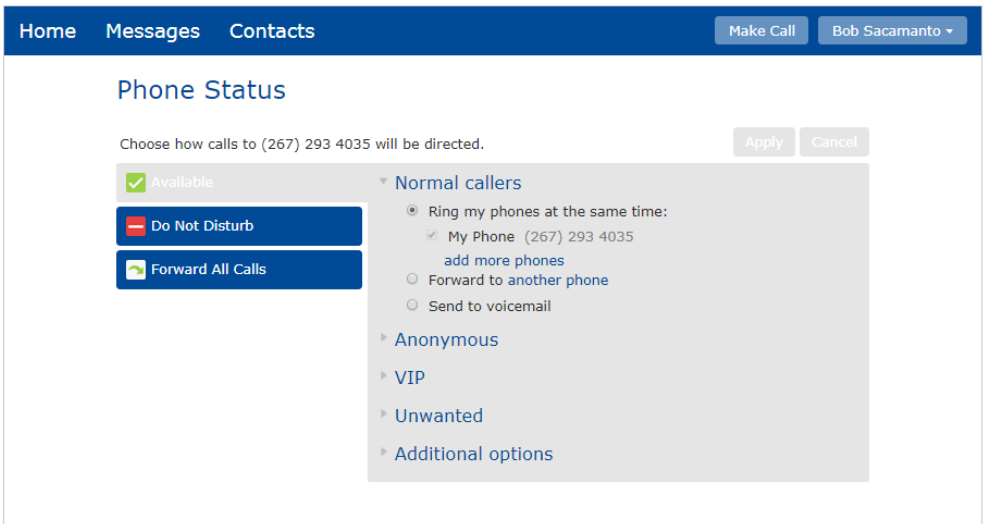
Business call managers allow the user to manage the way they receive phone calls using the three sections:

- **Available-** modify the way incoming calls reach you while your phone is available.
- **Do Not Disturb-** reject all calls directly to voicemail.
- **Forward All Calls-** send all calls directly to a different destination.

Each of these are discussed in the subsections that follow.

2.4.1 Available Tab

The Available tab of the business call manager configures how incoming calls reach you while you are available.

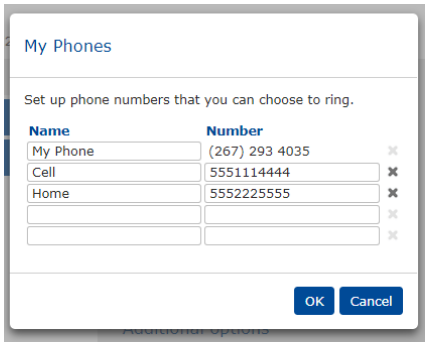


2.4.1.1 Normal Callers

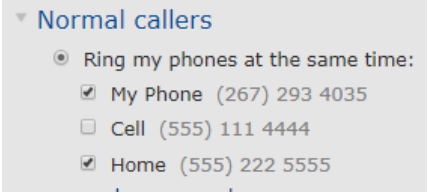
The Normal Callers section allows you to ring several phones at the same time, forward all calls elsewhere, or send all calls to voicemail.

To ring several phones at the same time:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **Normal Callers**
- Select ***Ring my phones at the same time***
- Click **add more phones (**or ***change*** **my phones)**
- **Add or remove** other ringing destinations. To add, input the name and phone number or extension. To remove, click on the trash icon to the right of the entry. Repeat for additional numbers as necessary.
- Click **OK**



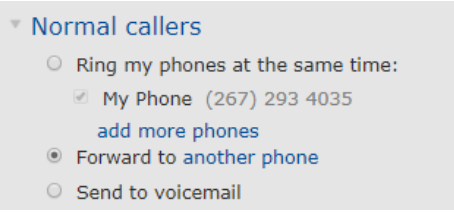
- Place a **checkmark** by all lines you wish to ring simultaneously
- Click **Apply**



It is important to keep *My Phone* checked if you want your primary line to ring.

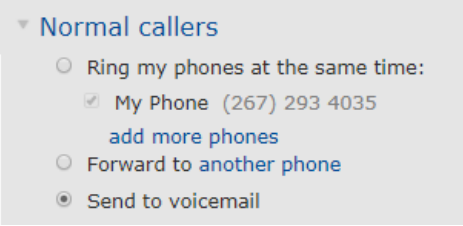
To forward all calls to a different destination:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **Normal Callers**
- Select ***Forward to….***
- Click the destination number to modify if necessary then click **OK**
- Click **Apply**



To send all calls to voicemail:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **Normal Callers**
- Select ***Send to Voicemail***
- Click **Apply**

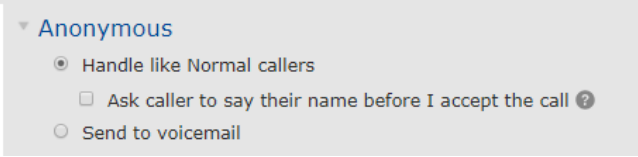


2.4.1.2 Anonymous

By default, if you receive a call from an anonymous (no caller ID) entity, it will be handled with the rules you have outlined in the Normal Callers section. If you wish to apply an alternative treatment to these calls, the Anonymous section allows you to add rules that apply only to Anonymous calls.

To modify the anonymous call settings:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **Anonymous**
- Options available include:
  - Place a checkmark by *Ask caller to say their name before I accept the call* to require the caller to say their name. When you answer a call with this treatment, you will hear the callers name and can choose whether or not to accept it.
  - Choose the *Send to voicemail* option to send all anonymous calls to voicemail.

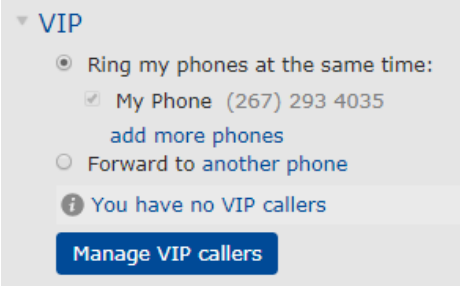


2.4.1.3 VIP

The VIP section allows you to create a list of priority callers for which a different call treatment will be assigned. For example, you may with to only ring your desk phone with normal calllers, but when certain clients call, you want several phones to ring simultaneously. The list of VIP callers and the associated treatment can be set up in this section.

To assign a treatment for VIP callers:

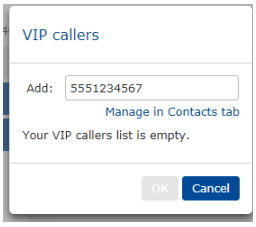
- Navigate to the **Home** screen
- Select **Available** tab
- Select **VIP**
- Options available include:
  - To ring several phones at the same time, choose the *Ring my phones at the same* time then click *add more phones* and add or remove ringing destinations.
  - To forward these VIP callers directly to another phone number or extension, select *Forward to …* and modify the destination as needed.
- Click **Apply** to save any changes.



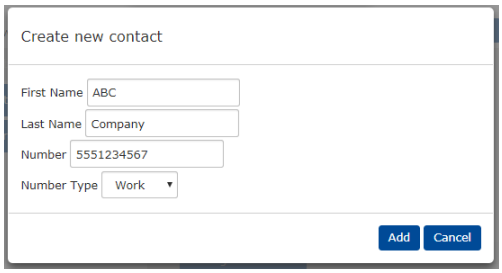
To create a list of VIP Callers:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **VIP**
- Click

- Add new telephone numbers then press **Enter**



- In the screen that appears, finish detailing the contact's first and last name then click **Add**.



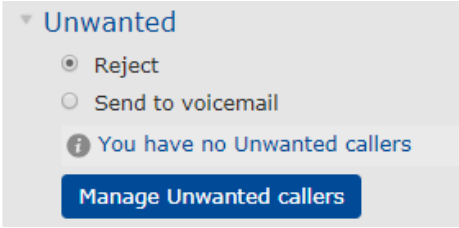
- Click **OK** to complete.

2.4.1.4 Unwanted

The Unwanted section allows you to create a list of callers you want to reject completely or send directly to your voicemail.

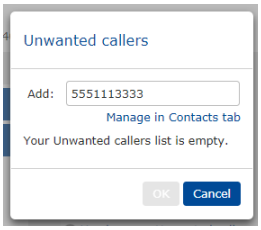
To assign a treatment for Unwanted callers:

- Navigate to the **Home** screen
- Select **Available** tab
- Select **Unwanted**
- Options available include:
  - To reject unwanted calls with a rejection message, select the *reject* button
  - To send unwanted calls directly to voicemail, select the *send to voicemail* button
- Press **Apply**



To create a list of Unwanted Callers:

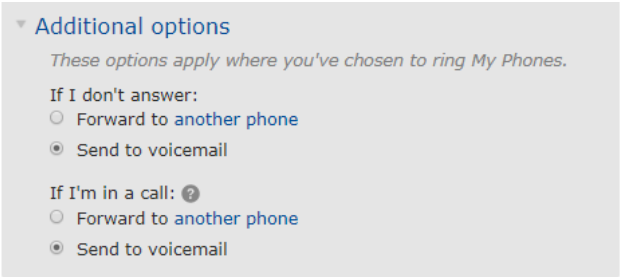
- Navigate to the **Home** screen
- Select **Available** tab
- Select **VIP**
- Click Manage Unwanted callers
- Add new telephone number in the popup box then press **Enter**



- In the screen that appears, finish detailing the contact's first and last name then press **Add**.
- Click **OK** to complete.

2.4.1.5 Additional Options

The Additional Options section modifies any treatment of incoming calls where you have chosen to ring your primary line ("My Phone"). This section allows you to set up no answer or busy forwarding as shown below.



To modify the Additional Options section:

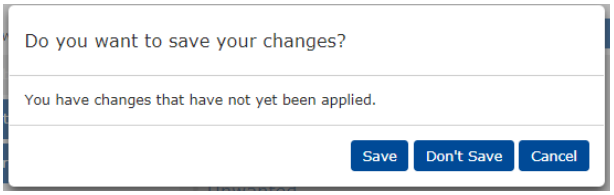
- Navigate to the **Home** screen
- Select **Available** tab
- Select **Additional Options**
- Options available include:
  - *If I don't answer* allows you to choose to send a call to an alternate number or voicemail if your phone rings but you do not answer it.
  - *If I'm in a call* allows you to choose to send a call to an alternate number or voicemail if your line is busy. Keep in mind that your device may allow for more than one call- all of your call paths must be busy for this forwarding to engage.
- Click **Apply**.

2.4.2 Do Not Disturb Tab

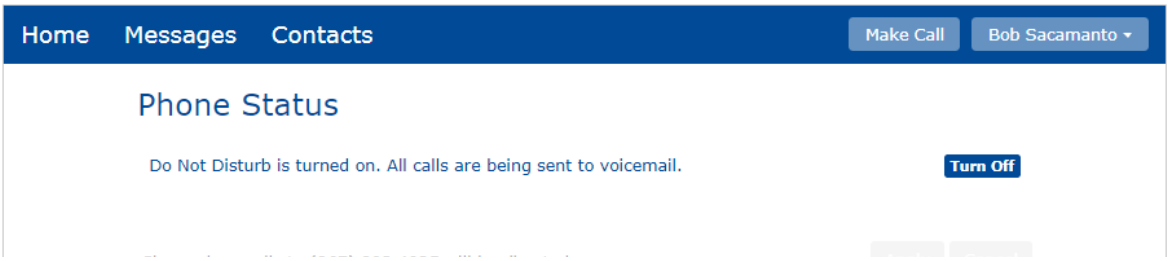
If you choose not to be available for calls, you may place yourself into Do Not Disturb to send all calls to voicemail. This feature may also be engaged and disengaged from most desk phones or the soft phone application. While Do Not Disturb is on, you may still make outbound calls normally.

To turn Do Not Disturb on:

- Navigate to the **Home** screen
- Click **Do Not Disturb** tab
- To apply the change, click Save on the popup screen



Changes will be reflected in the Home screen to confirm that Do Not Disturb is on.



To turn Do Not Disturb off:

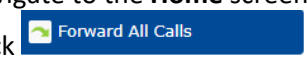
- Navigate to the **Home** screen
- Click **Turn Off**

Changes will be reflected in the Home screen to confirm that Do Not Disturb is off

2.4.3 Forward All Calls Tab

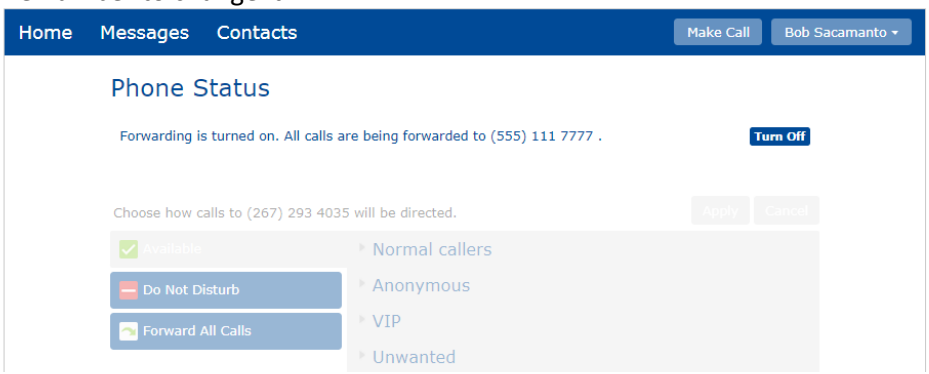
If you wish for all incoming calls to be forward to an alternate phone number or extension, this change can be made quickly in the Forward All Calls tab.

To forward all calls:

- Navigate to the **Home** screen
- Click 

tab

Forwarding will be turned on immediately and the changes will be reflected in the Home screen to confirm that all calls are forwarding as shown below. To modify the forwarding destination, click on the telephone number to change it.



To turn forward all calls off:

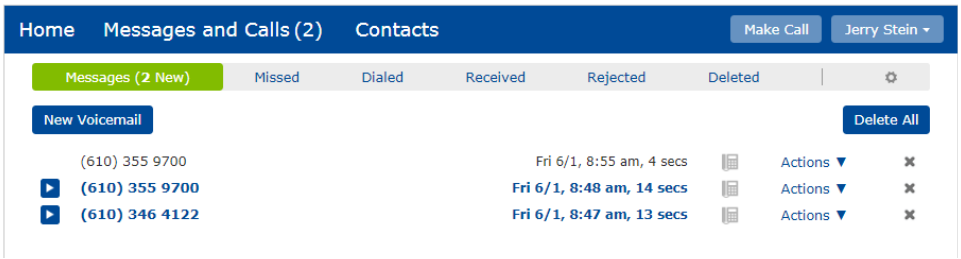
- Navigate to the **Home** screen
- Click **Turn Off** tab

3. Messages

The top toolbar includes quick access to the *Messages* section in which you can manage received voicemails and faxes and review the most recent calls.

If you have new messages, the top toolbar will indicate how many are new in parenthesis as shown in the following example:

To access the section, click the title, *Messages* or *Messages and Calls*. From there you may access up to seven subsections that are explained below.



3.1 Messages Subsection

Messages are voicemails that have been received to your phone number. This section shows all new and stored voicemail messages (if messages are being retained in the portal see section 5.3).

To access the Messages section:

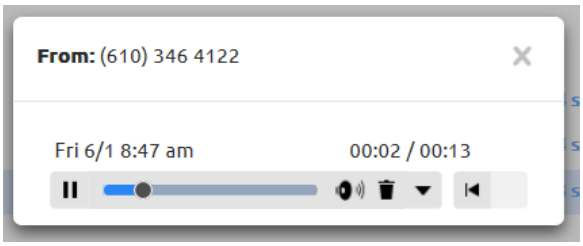
- Click **Messages and Calls** in the top toolbar
- Select **Messages** subsection

This section shows all new and stored voice messages. All unheard (new) messages are shown in **bold** type. All messages will list the caller identification information, time and date of the call, and length of the voicemail message. If voicemail transcription is enabled on your line, you will see the transcription in the portal as well.

You may modify the voicemail distribution settings to receive messages to your phone and CommPortal, your email, or both. More information on this is found in section 5.3.

3.1.1 Listen to a Message

To listen to a message, click the play icon to the left of the message. The player will open, allowing you to listen to the message automatically. You can also fast forward, rewind, and pause throughout the message using the player buttons.



3.1.2 Delete a Message

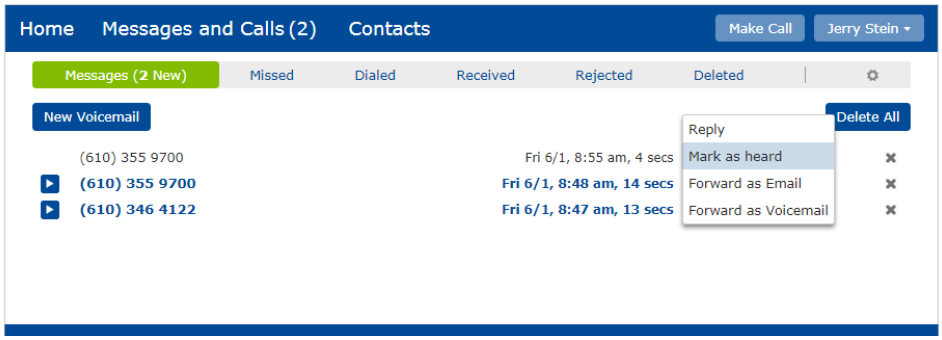
To delete a voice message, click the **X** to the right of the message you are ready to discard. You may also delete all messages in the inbox by clicking on the Delete All button at the top of the screen. Deleted messages are moved to the Deleted section for 14 days before being permanently discarded.

3.1.2 Actions

You may use the Actions ▼ drop down to view other features.

The Actions menu includes the following capabilities:

- **Reply-** If you have a microphone device on your computer, you can reply to a voicemail in this way. When you are done recording a message, press the Send button the relay the message.
- **Mark as heard/new-** Use this option to categorize a message as new (bold) or heard.
- **Forward as Email-** Forward messages to email address(es) of your choice using this option. The voicemail will be attached to the message as a .wav file.
- **Forward as Voicemail**- To send this voicemail to another internal user, choose this option from the menu then enter the destination DID (ten digit direct dial number). Press the Send key when ready to send. This feature is only available when sending to users that exist on the same phone system.



You may modify the message distribution settings to receive or not receive voicemails to your CommPortal. More information on this is found in section 5.3.

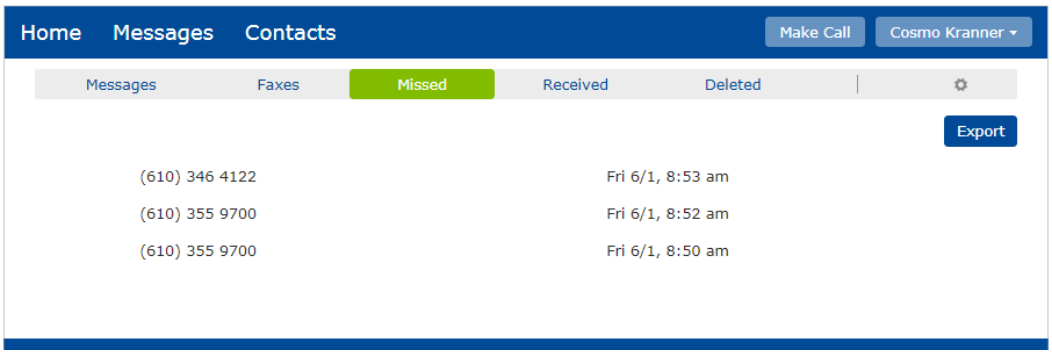
3.2 Faxes

The Faxes section will only appear if you have a personal efax number. If your efax messages are being retained in the CommPortal, this section shows all new and stored fax messages in the same way Messages tab does for voice messages. Likewise, you can view, save, delete, and forward faxes in a similar manner. All unheard (new) messages are shown in **bold** type.

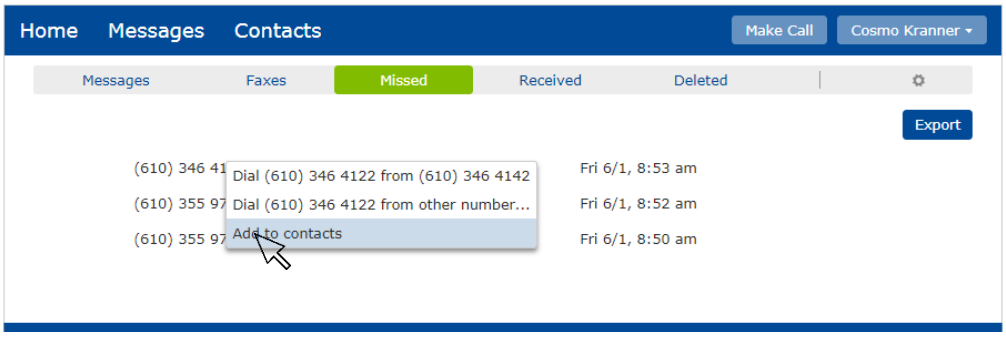
You may modify the message distribution settings to receive or not receive faxes to your CommPortal. More information on this is found in section 5.3.

3.3 Missed

The *Missed* section shows recent calls you have received but did not answer.



If the caller is already in your Contacts list (see section 4.1), their name will be shown in bold type. Click on any call to choose from the Make Call options (see section 1.5) or add to your contact list options.



3.4 Dialed

The Dialed section shows recent calls you have made

If the caller is already in your Contacts list (see section 4.1), their name will be shown in bold type. Click on any call to choose from the Make Call options (see section 1.5) or add to your contact list options.

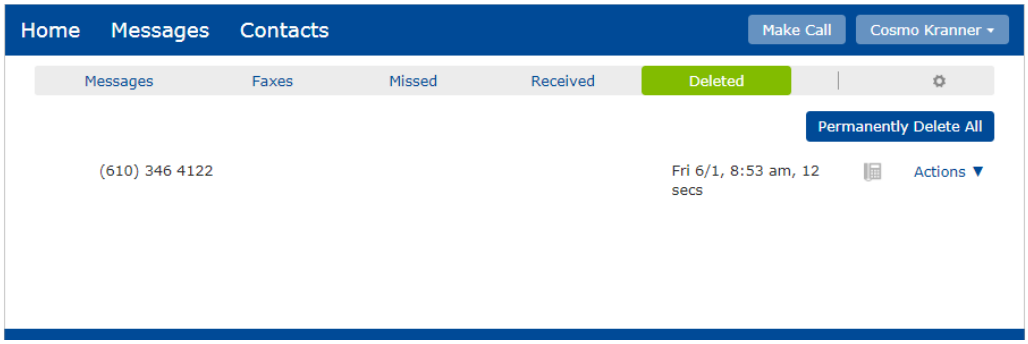
3.5 Received

The Received section shows recent calls you have answered.

If the caller is already in your Contacts list (see section 4.1), their name will be shown in bold type. Click on any call to choose from the Make Call options (see section 1.5) or add to your contact list options.

3.6 Deleted

The Deleted section lists recently deleted voicemails and faxes that had been sent to your phone and/or CommPortal. For most accounts, messages are stored for 2 weeks before permanent deletion. Similar to the Messages subsection (section 3.1), you may play or view messages using the play button. You may also use the *Actions* drop down menu to initiate the restoral or permanent deletion of the message.



4. Contacts

The Contacts section allows you to add up and view contacts in your CommPortal. Doing so makes it easier to use some additional features. For example, you can utilize the *Make Call* (see section 1.5) feature on any of your contacts.

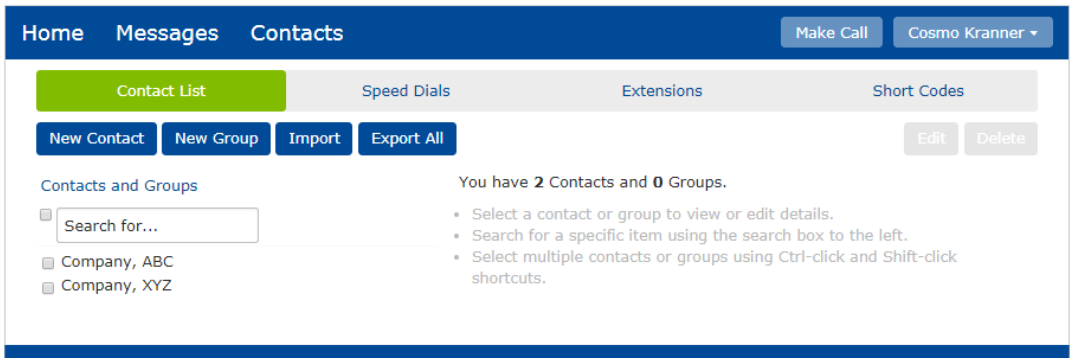
The Contacts section includes several subsections, depending on the type of service you have. Select the related tab to navigate to it.

- **Contact List-** Allows you to manage your personal contact list.
- **Speed Dials-** Configure numeric speed dials.
- **Extensions**- Shows the extensions within your business group.
- **Short Codes-** Displays any available, group-wide speed dials.

Each of these sections is described in greater detail below.

4.1 Contact List

The Contact List assists you in managing all your current contacts. You may store up to 1000 contacts in the CommPortal.



4.1.1 Contact List Search

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

To choose one of the returned results, click the entry and the contact information will appear in the right pane. You may initiate the *Make Call* feature at any time by clicking on the telephone number to call (see section 1.5). To cancel the search and view all your contacts, remove the search text you entered.

4.1.2 Contact List Add

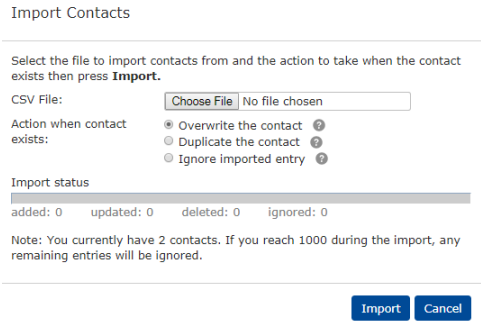
Adding a new contact can be done in several ways.

To add a new contact manually in this section, follow these steps:

- Click the New Contact button
- **Enter** the contact details in the text boxes provided on the right side of the screen.
- **Enter** the phone number(s) for the contact. If supplying more than one, you may select the radio button to the right of the number to indicate this is the preferred calling number for this contact.
- Click the **Save** button.

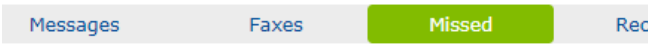
To add new contacts using the Import feature, follow these steps:

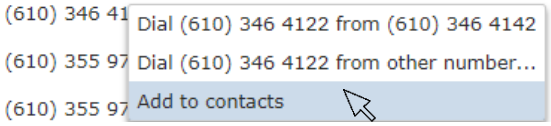
- **Export** contacts from your current database as a .csv file and save to your computer. If you are unsure as to how to format this file, see section 4.1.4 for exporting a contact from this template.
- Click the Import button in the CommPortal Contact List subsection
  - Click on **Browse** to find the saved .csv file of your choice then modify any other desired actions below the chosen file. Hover over the question mark on each for more information.
  - Click the **Import** button on the popup box to initiate the Import.



To add contacts in other portions of the CommPortal:

- **Right-click** the telephone number or contact name that you want to add as a contact (for example, in the "Messages" section pictured below:





- Choose **Add to contacts** from the list.
- This immediately takes you back to the Contact List section and fills out several fields. **Add** desired details.
- Click the **Save** button.

4.1.3 Contact List Groups

To make it easier to manage contacts, you may put them into groupings. For example, you may have a group for "Work" contacts and another group for "Personal" contacts.

To add a contact list group:

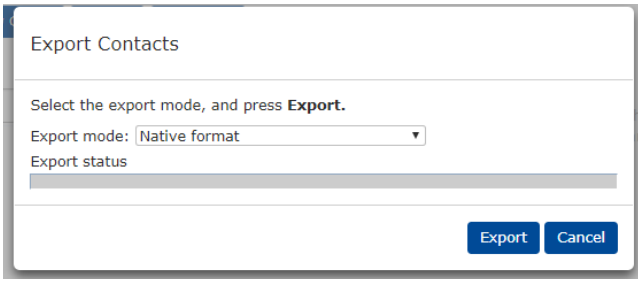
- Click the New Group button.
- Enter a name for the group in the **Group Name** field.
- Enter a numerical ID for the group in **Telephone ID** field (optional).
- **Select** any contacts you want to be added to the group from the list in the right-most pane.
- Click the **Save** button. The new group will now appear in the Contacts & Groups section.

You may select a group to search it for specific members.

4.1.4 Contact List Export

You may extract a full list of your contacts from the CommPortal.

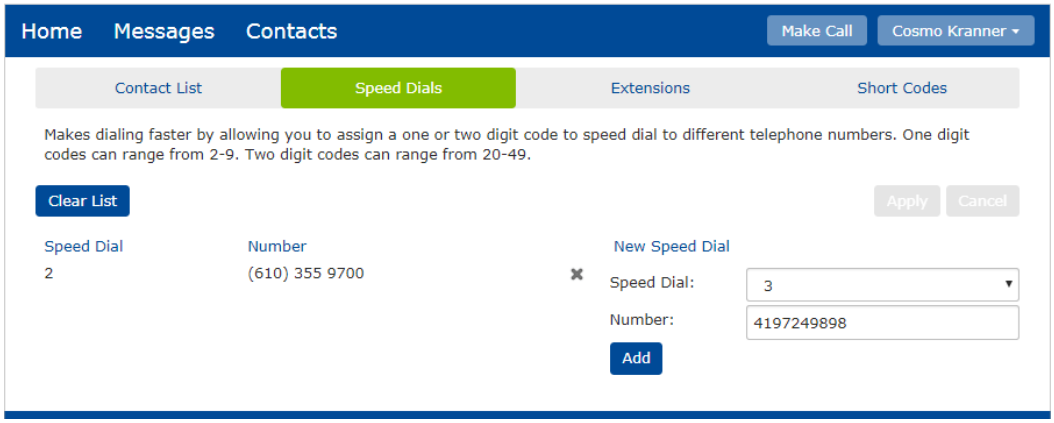
- **Export** contacts from your current database as a .csv file and save to your computer.
- Click the Export All button in the CommPortal Contact List subsection



- Choose the desired export formatting in the *export mode* field. Native format will export as a .csv file type.
- Click the **Export** button to initiate the export.

4.2 Speed Dials

The Speed Dials section allows you to configure numeric speed dials. These make dialing from your hosted phone faster since you only have to dial the one or two digit speed dial number configured. Keep in mind that these differ from a speed dial key that may be assigned to a key on your phone (see section 6.1).



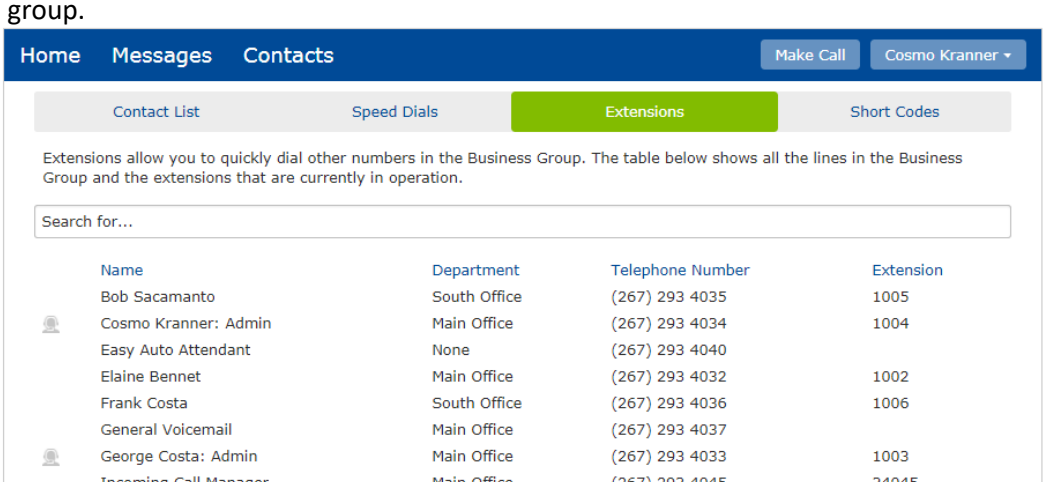
To add a speed dial:

- **Select** an available number from the *Speed Dial* drop down list.
- **Enter** the ten digit number in the *Number* field that this speed dial should call when accessed.
- Click **Add.**
- Click **Apply** to save changes.

You may remove a speed dial by clicking on the **X** by the speed dial you wish to remove.

4.3 Extensions

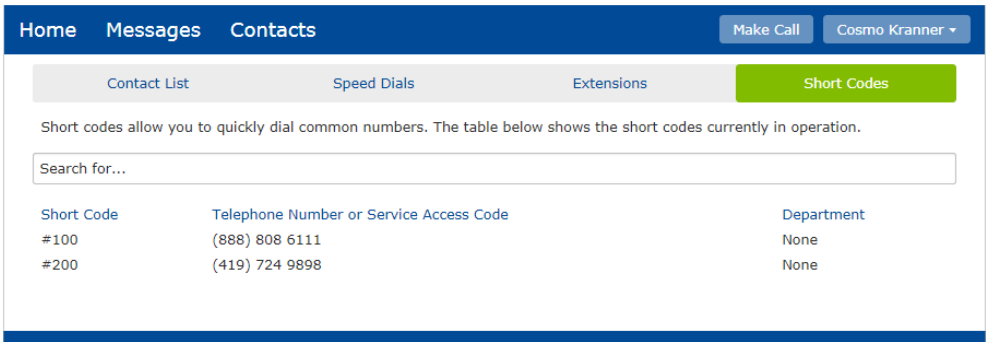
The Extension section lists all of the extensions and phone numbers that are part of your internal business group.



You may use the *Search for…* box to search for a contact. Similar to a Contact List search, the system will narrow down the results as you type.

4.4 Short Codes

The Short Codes section shows any company-wide speed dials available to you. These are set up by your system administrator.



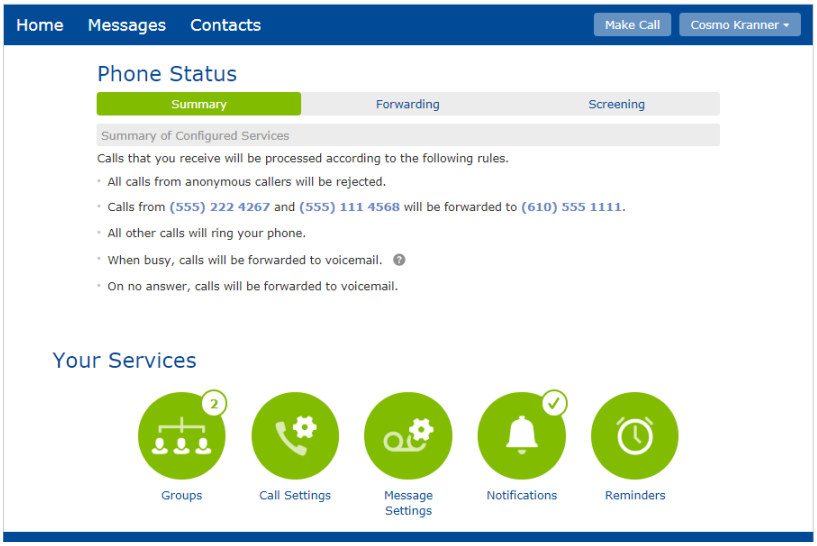
To use an available short code, simply dial it from your phone in the same way the way the speed dials are used. In the example above, the user may dial #100 from their desk phone and it will automatically dial 888-808-6111.

5 Your Services

While in the Home view, you may access all the other services associated with your account.

To access any of your services:

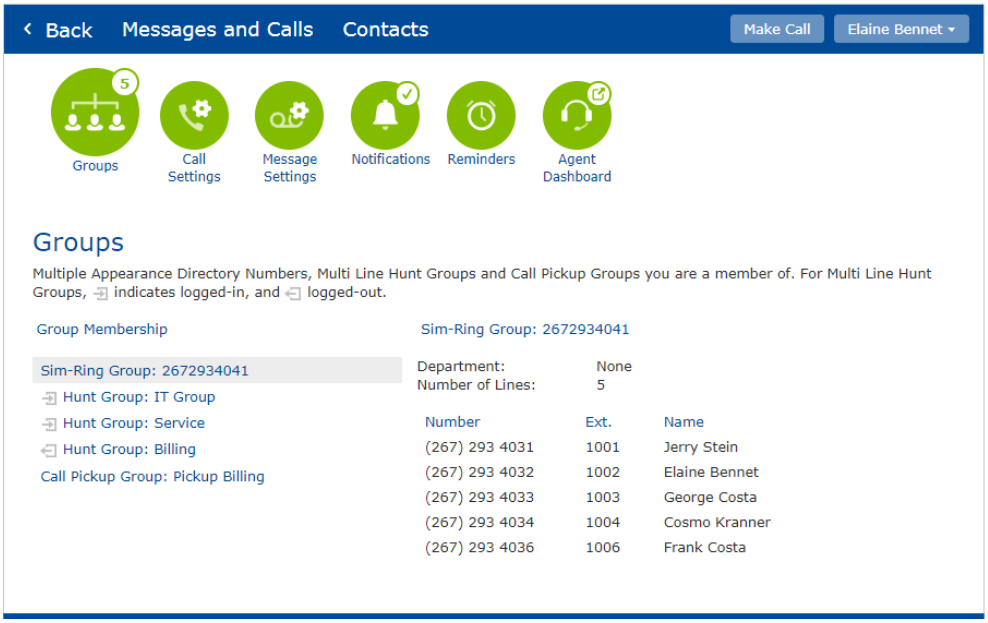
- Navigate to the **Home** screen
- Click on the desired services in the *Your Services* section



Associated services may vary on the features deployed to your site. Please see your system administrator with any questions about additional services.

5.1 Groups

The Groups section may detail any groups your system administrator has your account linked. If you have questions about any of your group memberships, please see your system administrator or the *Commportal Administrator Guide*.



The group types in this section may include:

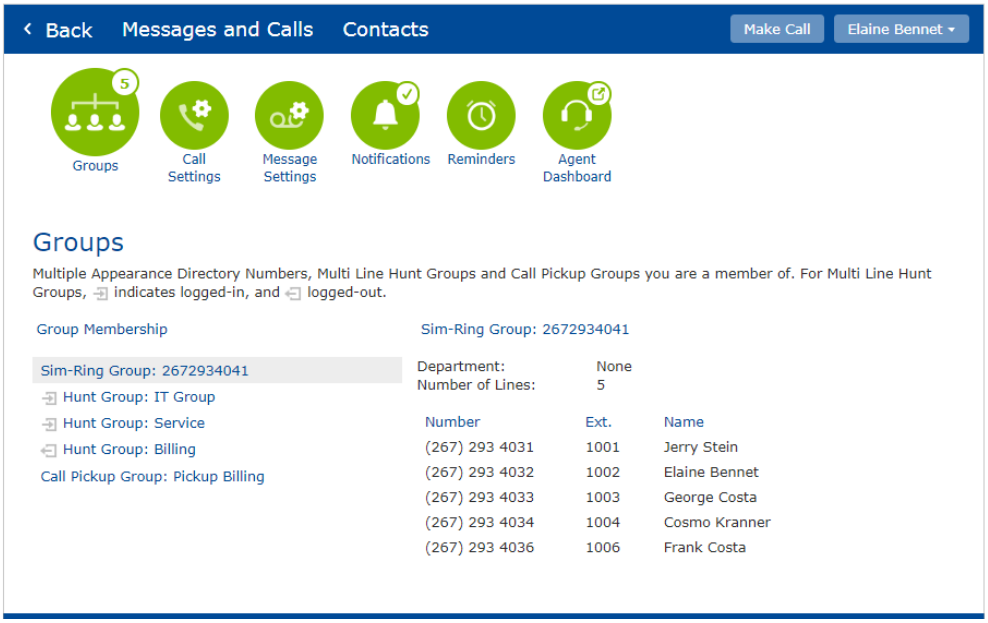
- **Sim-Ring Group**
- **Hunt Group**
- **Call Pick Up Group**

Each of the three group types are discussed in the sections that follow.

The Groups section allows you to see the all the groups that you belong to on the **Group Membership** panel. Click on the name of the group in the panel to display the details of the group in the main part of the screen.

5.1.1 Sim-Ring Group

Sim-Ring Groups are simply groups of extensions that ring together (simultaneously). If you are a member of one or more Sim-Ring groups, each group and its associated members will show in your Groups panel.



There are no configuration changes to make in the User CommPortal for a Sim-Ring Group. All changes must be made by the system administrator in the Administrator CommPortal.

5.1.2 Hunt Group

If you are part of a Hunt Group, it may be either a regular hunt group or an ACD group (also known as call center).

Your administrator may have set up your hunt group to allow you to log in and out.

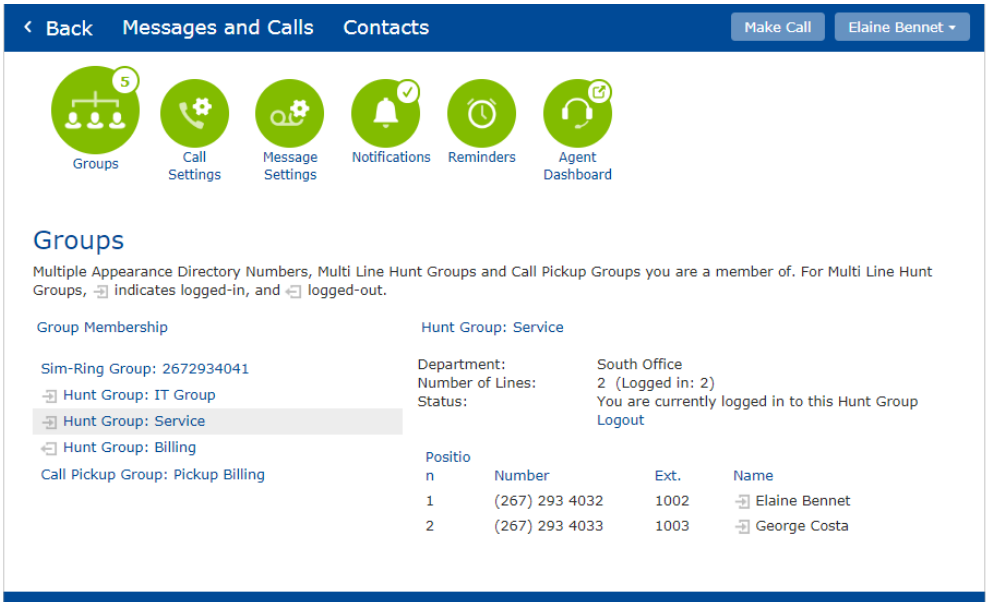
- When you're logged in, calls to that Hunt Group can ring to your phone.
- When you're logged out, you will not receive queue calls, however you can still receive direct calls to your extension or direct dial phone number.

When you are logged into your CommPortal, you can use it to log in or out of a Hunt Group.

To log in and out of a hunt group via the Personal CommPortal:

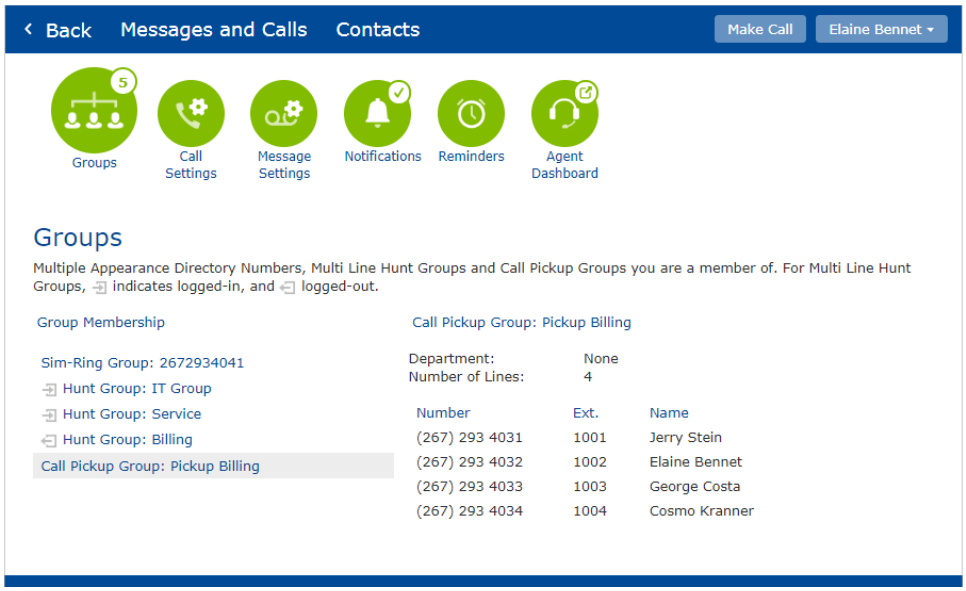
- Navigate to the **Home** screen
- Click **Groups** in the *Your Services* section
- In the **Group Membership** pane on the left, select the Hunt Group you want to manage.
- In the information on the right pane, click on the **Login** or **Logout** link in the Status section above the lines of the Hunt Group. The icon associated will change accordingly to show that you are logged in or logged out . The ability to log in or out is only available if your system administrator has allowed you to do so.

If any of your hunt groups are ACDs (call centers), you will also have access to the Agent Dashboard section. For more information on this, see section 5.6.



5.1.3 Call Pickup Group

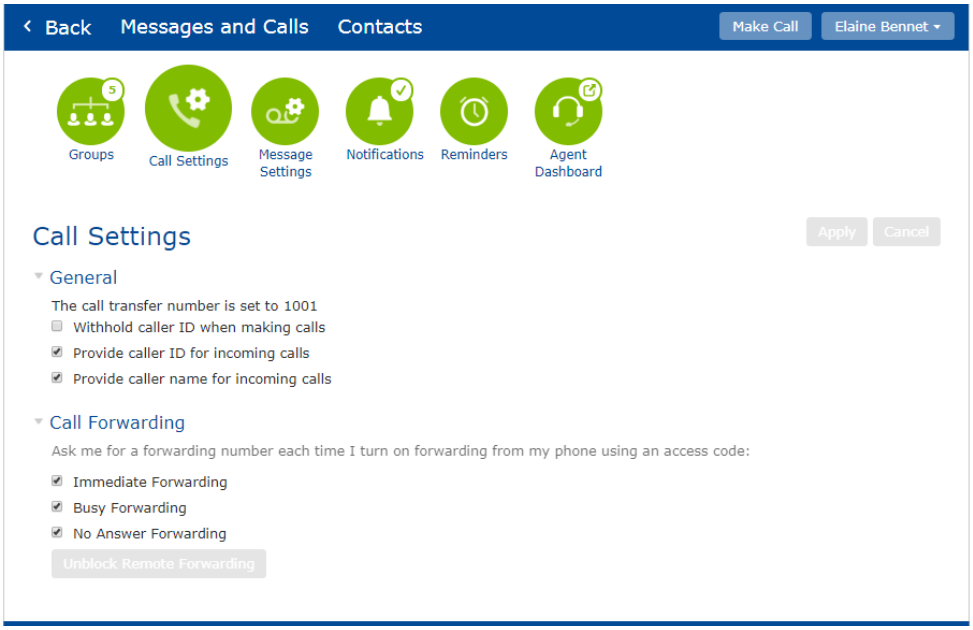
Call Pickup Groups allow members to answer each another's calls if they hear the other member's phone ring.



In the example above, there are four members of the call pick up group. If the person sitting at extension 1004 hears extension 1001 ringing, that person at 1004 may answer the ringing call by either dialing *11 or pressing a pre-configured pickup button on their phone. The system will search for the first, ringing call coming into that Pickup group and answer it.

5.2 Call Settings

The call settings section gives you access to several options for outbound calls and call forwarding.



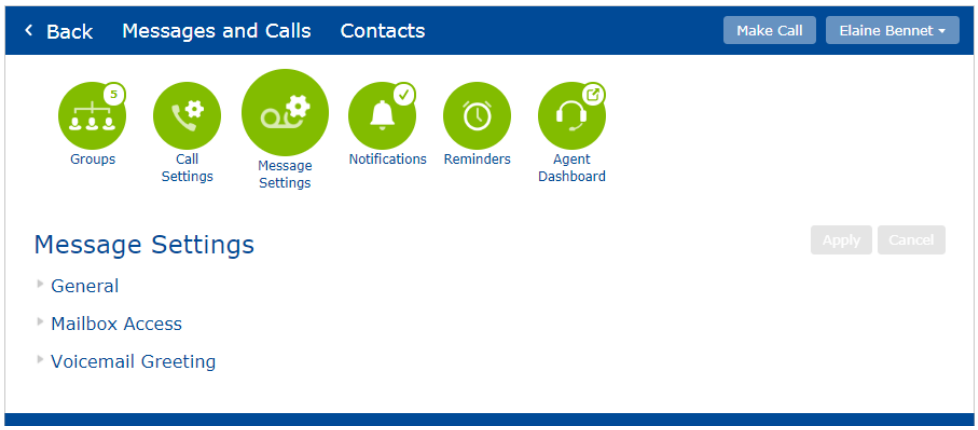
The *General* section includes the following information and options:

- **States if there is a call transfer number.** If a call transfer number is configured by the system administrator, it provides a "zero out" option to callers when they reach your voicemail message. For example, if the listed extension is for the receptionist, you may record your voice message telling the caller to stay on the line to leave you a message *or* press 0 to return to the operator. If you have questions or changes to request to this field, please see your system administrator.
- **Withhold caller ID when making calls-** check to withhold your caller ID information while making outbound calls. Leave this field blank to outpulse your normal caller ID.
- **Provide caller ID for incoming calls-** check to enable caller ID number for incoming calls to your phone.
- **Provide caller name for incoming calls-** check to enable caller ID name for incoming calls to your phone.

The *Call Forwarding* allows you to adjust whether or not you need to enter a forwarding number each time you enable call forwarding from your handset. When the Immediate Forwarding box is checked, you are required to enter the telephone number to which you want to forward calls. When unchecked, a number is not required after it has been initialized at least once.

5.3 Message Settings

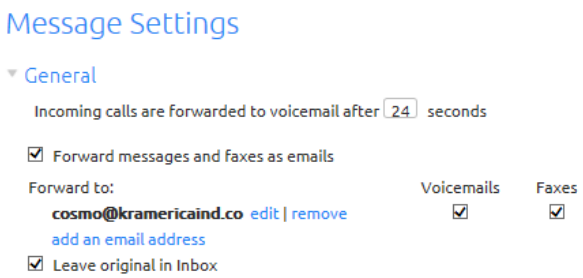
The *Messages Settings* section allows you to modify many voicemail settings.



The three subsections are discussed in the sections that follow.

5.3.1 General

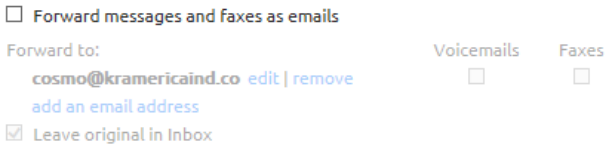
Use the General section to modify some of the most common voicemail and fax settings.



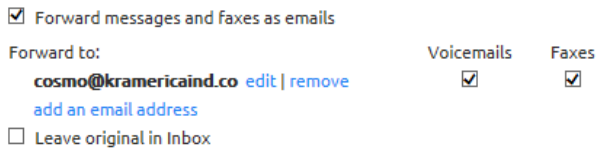
- **Incoming calls are forwarded to voicemail after**… The associated field shows how many seconds your phone will ring before forwarding to voicemail. Six seconds is approximately one ring. For example, entering 24 in this field will allow your phone to ring four times before the caller goes to your voicemail.

- **Forward messages and faxes as emails.** These fields indicate how you prefer to receive your voicemail and fax messages. When users receive messages to phone, they are also saved in their CommPortal. Below are the various scenarios you may set up.

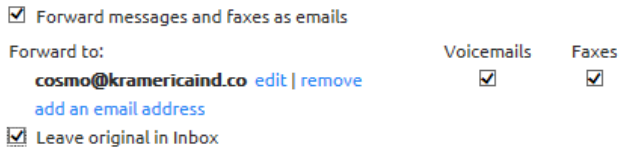
  - To get messages to <u>phone/commportal</u> only, no boxes should be checked.



  - To get messages to <u>email</u> only, check the box by *Forward messages (and faxes) as emails* then check voicemail and/or faxes to indicate which type of messages should be sent to you this way. Enter the email address(es) where you want to receive the messages.



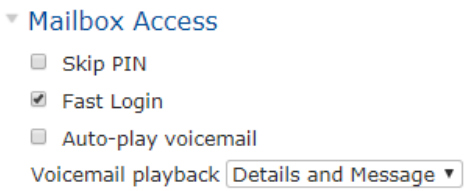
- To get messages to email and phone/commportal, check all boxes and enter the email address(es) where you want to receive the messages.



It is important to note that when receiving messages to phone and email, both repositories must be managed separately. In other words, if you delete the voicemail from your phone, it will still be in your email inbox. Additionally, fax services may not be enabled on your account. Please talk to your system administrator if you would like to add this feature.

5.3.1 Mailbox Access

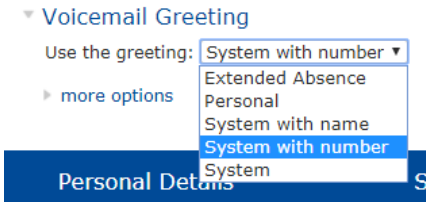
The Mailbox Access section allows you to configure some of the access options for your voicemail account.



- **Skip PIN.** When enabled (checked), the voicemail system will not require you to enter your PIN (password) when accessing the voicemail system from your phone. This saves time, however reduces the security of your messages.
- **Fast Login.** When enabled (checked), the system will not require you to enter your ten digit phone number when accessing it from your phone.
- **Auto-play voicemail.** When enabled (checked), new voicemails will begin to play as soon as you log into your mailbox instead of going through the main menu options first.
- **Voicemail playback.** When voicemails are played back, you can choose whether you wish to hear only the message details (who the message is from and when it was recorded), the message itself, or both.

5.3.2 Voicemail Greeting

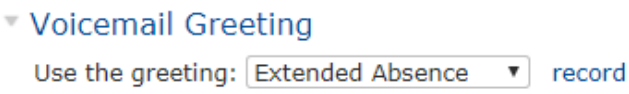
The Voicemail Greeting subsection allows you to change your voicemail greeting. You may select the desired greeting from the list of options available in the drop down box. All recorded greetings have an asterisk (*) by them.



In addition to any available, recordable greetings, the system also includes the following standard greetings:

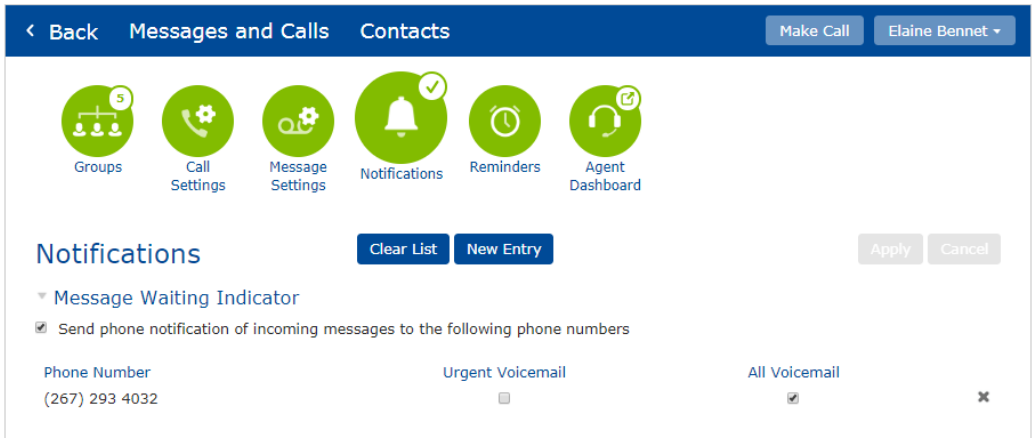
- **System**- This plays the normal system greeting with no identifying information.
- **System with Number**- This plays the normal system greeting including your ten digit phone number.
- **System with Name**- This plays the normal system greeting, but includes your recorded name.

If voicemail is accessed from the primary phone set, you can simply follow the prompts to record any available greetings. Alternately, you may edit any of your greetings via the CommPortal by clicking on the **record** option by the menu. When this link is clicked, you can either *record* using a microphone connected to your computer or *upload* a wav file recording.



5.4 Notifications

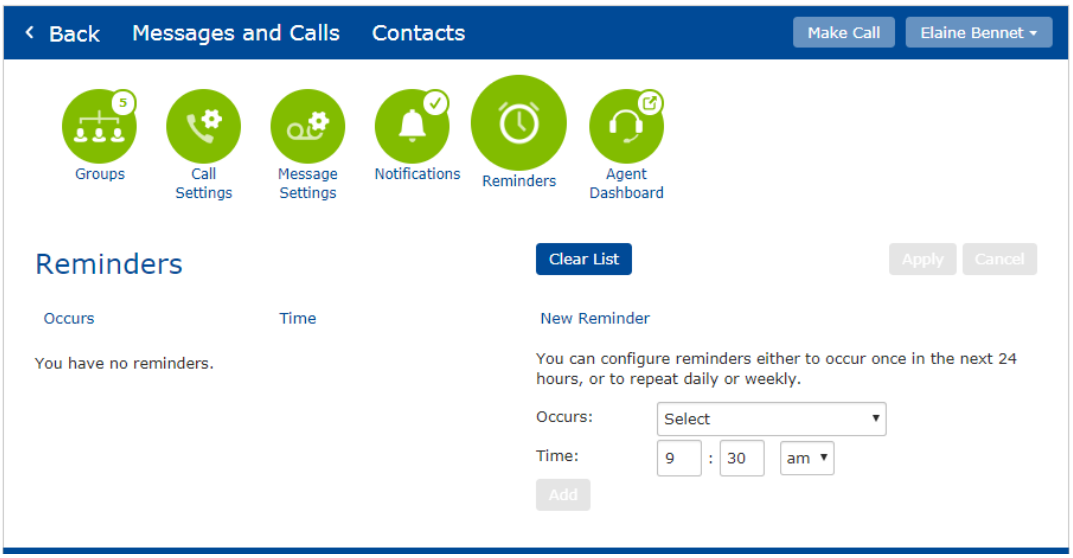
The Notifications section allows you to configure the different kinds of notifications that you can use with your messaging service.



The *Message Waiting Indicator* section allows you to manage what voicemails or faxes trigger a notification to your phone account. Modify which messages you are notified of by checking or unchecking the boxes. In most cases, users only check the “All Voicemail” box. For phone users, this notification would take the form of the small, red light on the phone set. For virtual or remote users, this would mean that when the user calls in to check voicemail, both voicemails and/or faxes would could towards any new messages.

5.5 Reminders

Reminder calls may be configured to call the phone associated with your account at designated times. The system will call your phone at those designated times. When the call is answered, the system will simply say “This is your reminder call”.



Active reminder calls show up in the left side pane.

To add a reminder call:

- Choose the frequency of the call in the **Occurs** field
- Specify the time in the **Time** field
- Click the **Add** button
- Click the **Apply** button

5.6 Agent Dashboard

If you are a member of an ACD Hunt Group for call center purposes, you will have access to an agent dashboard that gives more visibility and access to features for use as an agent.

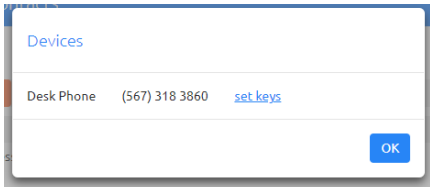
If you are a call center agent using this part of your portal to log in or out, see call center stats, or modify your availability, please see the associated *Integrated ACD Agent Guide* for more information.

6 Personal Details

The bottom toolbar of the CommPortal lists information about your account in the *Personal Details* section.

Here you will see your name and, if applicable what department you are in and whether you are an administrator. You also will see a clickable *Devices* link.

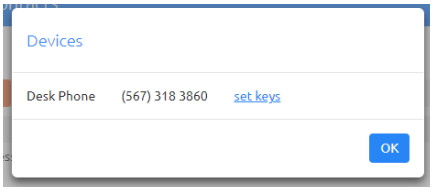
When you click on the *Devices* link, you will see telephone phone number tied to your phone account. If you have an efax associated with the account, the telephone number for it will appear as well.



The *Set Keys* link gives access to modifying any available keys on the phone set.

6.1 Set Keys

If you have a phone assigned to you, you may modify the available keys as follows:



- Click **Devices** in the bottom toolbar
- Click **set keys** in the popup box
- Click Edit **Edit** button

This will launch a new browser window in which you will be able to configure your phone. You may modify the available keys (if any) to be various speed dial numbers or monitored extensions.

The phone configuration tool differs based on the phone type being modified. The tool will either be the *Built In* or *End Point Pack* tool.

- Refer to the *Built In* configuration if you have:
  - All Aastra (Mitel) 6700 series phones (6753i, 6737i, 6755i, 6757i, 6739i)
  - All Polycom Soundpoints (450, 550, 650, 6000)

- Refer to the *Endpoint Pack* configuration if you have:
  - All Aastra (Mitel) 6800 series phones (6863i, 6865i, 6867i, 6869i, 6873i)
  - All Polycom VVX phones (3xx, 4xx, 5xx, 6xx)
  - All Yealink phones (T42x, T46x, T48x)

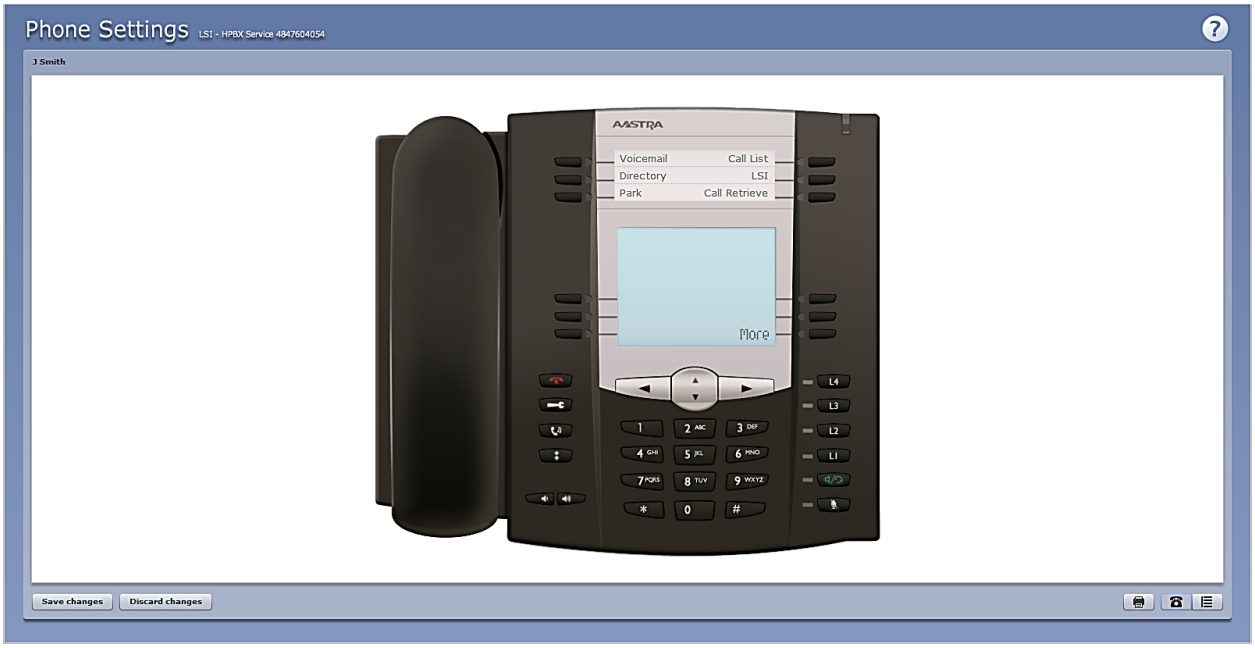
Both methods are explained below.

6.1.1 Programming Available Keys: Built In Method

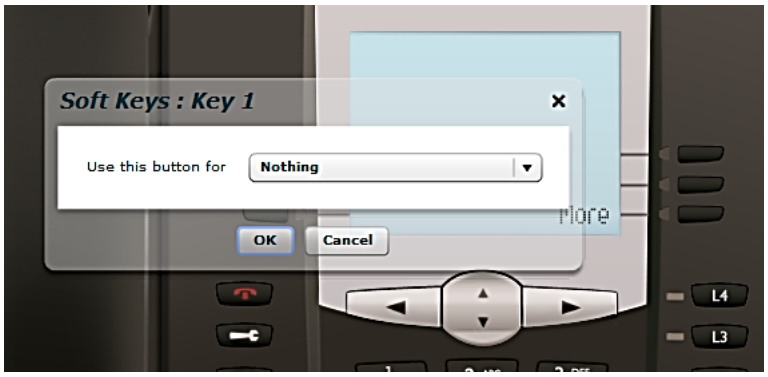
As mentioned before, to begin configuring your phone, click on **Devices - set keys - Edit** to begin configuring the phone keys.

Configuration of *Built In* phones must have a current version of Adobe Flash Player installed in order to use this portion of the portal.

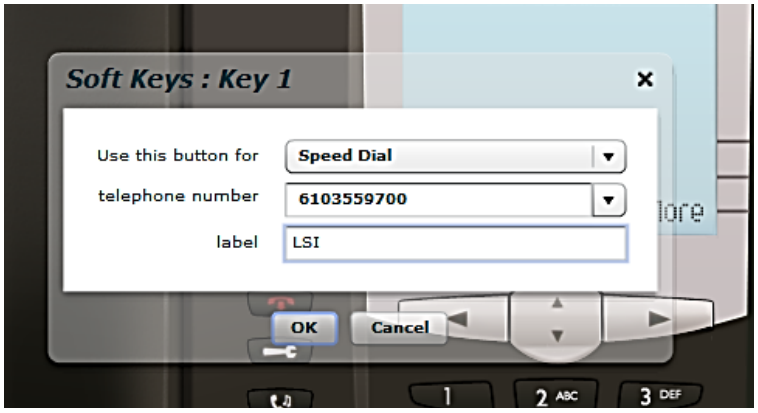
The example in this document shows an Aastra 6755i phone. Your phone make and/or model may differ from the one shown and thus the available features may differ as well.



If your phone model has programmable keys as the model shown, you can configure those buttons to be more useful. Select a key by clicking on it. A programmable key will show a blue glow around it when you hover the cursor over it. A non-programmable key will show a red glow when the cursor is hovered over it. Clicking on a programmable key will launch a pop-up allowing you to configure the key as follows:



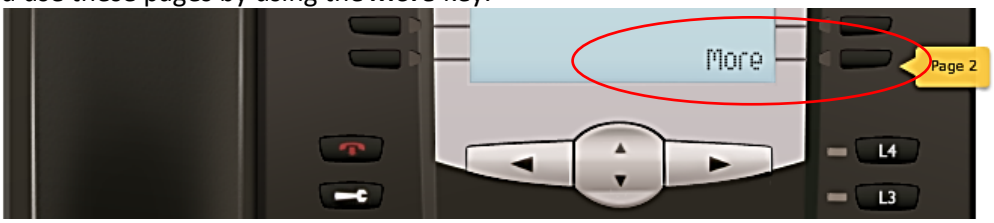
Use the drop-down list to select the operation that key should perform and configure. See the *Key Options* section 6.1.3 for a list of some of the available features.



When this is done, the picture of your phone will be updated to reflect the label given to your new key assignment:

When finished, press the **Save Changes** button at the bottom left of the screen. Your phone will update with these changes you have made overnight. Alternately, you may manually reboot your phone to see these changes immediately.

Some phones, like the Aastra series represented below, support several pages of keys. You can scroll through and use these pages by using the ***More*** key.



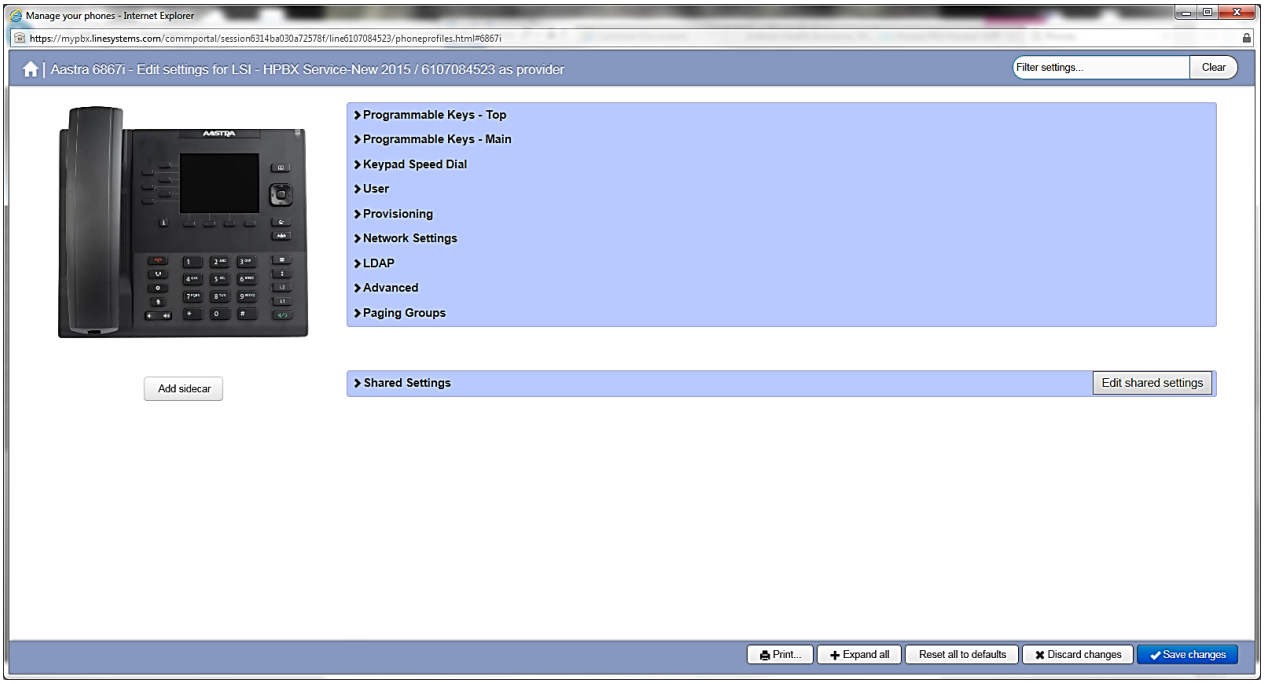
The *More* key will only show up on your desk phone when one of the following pages has a configured option on it.

For Built in phones, there is a more advanced interface for configuring your phone which may be accessed by clicking on the Table View icon at the bottom right the screen . This view is mostly used only by the system administrator or Telesystem to make specific changes to the behavior of your phone. For more detail on doing this, speak to your phone system administrator or see the *CommPortal Administrator Guide*.

6.1.2 Programming Available Keys: End Point Pack Method

As mentioned before, to begin configuring your phone, click on **Devices - set keys - Edit** to begin configuring the phone keys.

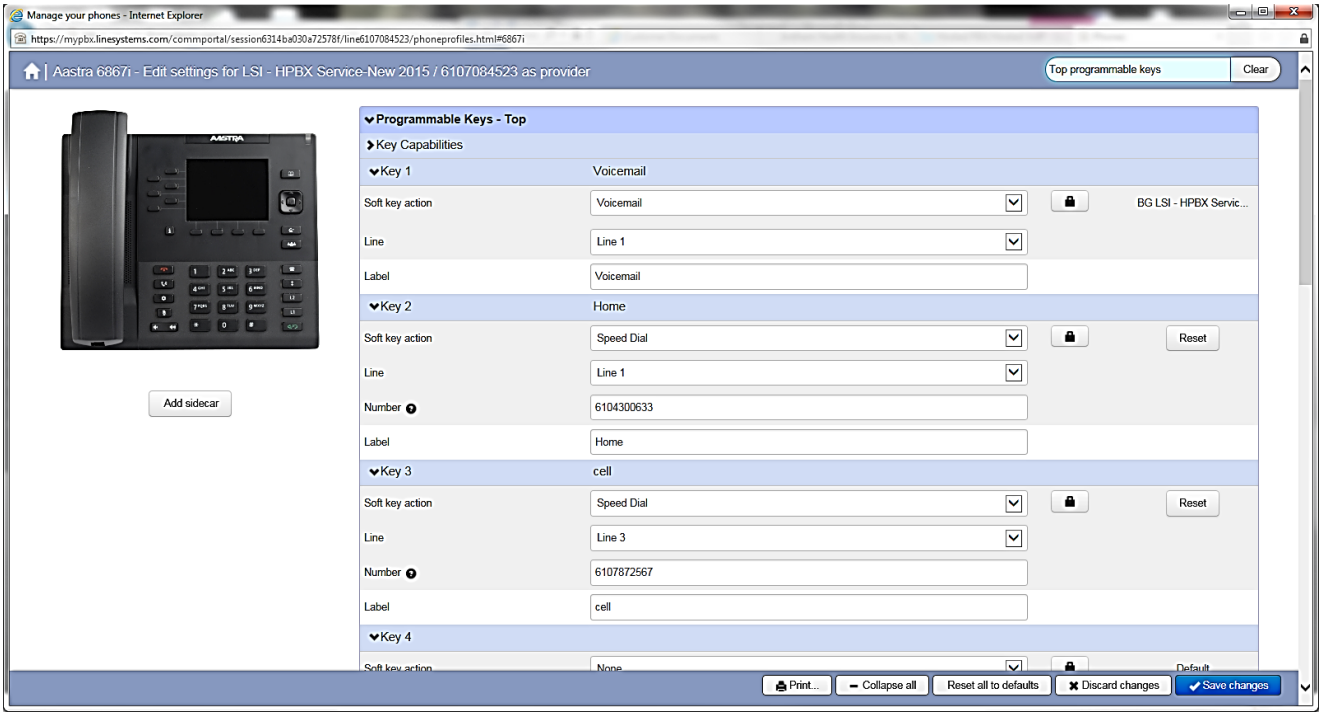
The example in this document shows an Aastra (Mitel) 6867i phone. Your phone make and/or model may differ from the one shown and thus the available features may differ as well.



In many cases, some keys have already been programmed by Telesystem prior to the phones being implemented, however you may have additional keys available to program. The table on the right side of the screen shown above shows several sections of programmable keys. Expand or collapse one or all sections by clicking on the title arrows ❯.

To decipher which keys are which, you may click on the group of keys to the left as shown below:

When the keys shown above were selected, the right table automatically opens to the proper section. In this case, the *Programmable Keys- Top* section opens as shown below.

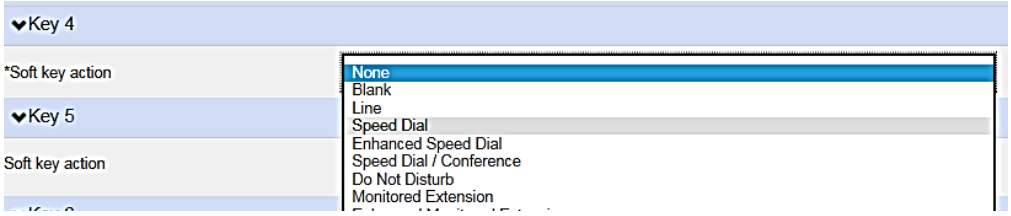


To program a key, choose the desired key from the list, assign it an action, fill in the details, then save. In the example below, we will program the fourth key to be a speed dial.

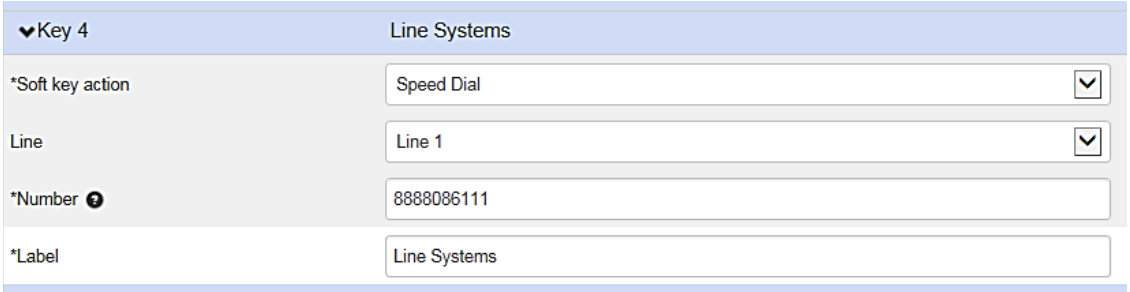
Programming a key (End Point Pack):

- Select the desired key

- Select the appropriate Soft key action from the drop down (see Key Options section 6.1.3 for more information about relevant features)



- If programming a monitored extension or speed dial, input the appropriate label and number. Please note that the "line" field should always be Line 1 as shown below unless your other lines are set up as alternate identities you wish to use.



- Click the Save Changes button

. Your phone will update with these changes you have made overnight. Alternately, you may manually reboot your phone to see these changes immediately.

There are many more advanced options in the phones section that assist in configuring your phone. These options are primarily modified by the system administrator or Telesystem since they can affect the phone on a deeper level. For specific questions about other settings, please contact Telesystem or speak with your system administrator.

6.1.3 Key Options Summary

The most commonly used key functions are *speed dial* and *monitored extension*, however when programming you will find that there are more options available to you. While configuring the buttons, the drop down menu may include some or all of the following depending on your model phone.

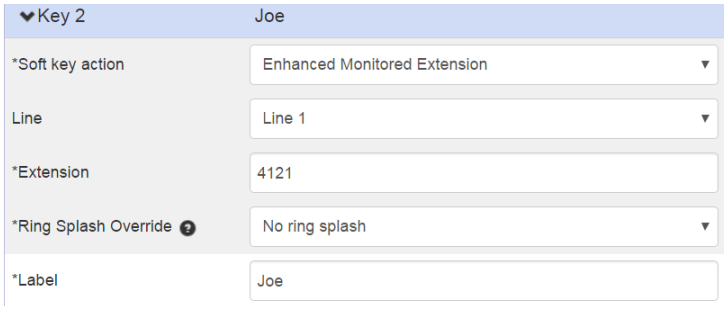
- **Nothing**- This is used when a key is assigned no function.
- **Speed Dial**- Dials a specific telephone number when pressed.
- **Enhanced Speed Dial**- Dials a specific telephone number when pressed. Also allows the user to perform a one- press transfer that that phone number. Mitel (Aastra) only.
- **One Touch Transfer**- Also allows the user to perform a one- press transfer that that phone number. Polycom VVX only.
- **Speed Dial/Conference**- Initiates a three way conference call with a specific phone number. Mitel (Aastra) only.
- **Do Not Disturb**- Configures a key for the Do Not Disturb service.
- **Monitored Extension**- Acts as a speed dial to an internal extension when pressed. Depending on phone model, the key will be lit appropriately when that extension is already on a call, in do not disturb, ringing, or available.
- **Enhanced Monitored Extension**- Acts as a speed dial to an internal extension when pressed. Depending on phone model, the key will be lit appropriately when that extension is already on a call, in do not disturb, ringing, or available. Also allows the user to perform a one- press transfer.
- **Enhanced Call Park**- Will park, show, and retrieve a parked call (see below for further explanation on call park).
- **Park Call**- Parks a call (see below for further explanation on call park).
- **Retrieve Parked Call**- Retrieves a parked call (see below for further explanation on call park).
- **Call List**- This key will show you a list inbound calls to the phone that includes both answered and missed calls. It stores up to 200 entries before beginning to remove the oldest entries.
- **Directory**- Configures a key to provide a phone list of the business group extensions. The native phone directory stores up to 200 extension entries.
- **Intercom**- Allows you to initiate an intercom call. Intercom calls require the receiving phone to auto-answer in most cases.
- **Voicemail**- This key acts as a speed dial to the voicemail system.
- **Group Pickup**- This key is a speed dial for the group pickup service (see below for further explanation). This does not make your phone ring simultaneously with the other group members.
- **Directed Pickup**- This key is a speed dial configured to pick up calls ringing to a particular extension (see section below for further explanation). This does not make your phone ring simultaneously with the other extension.

6.1.4 Further Feature Explanation

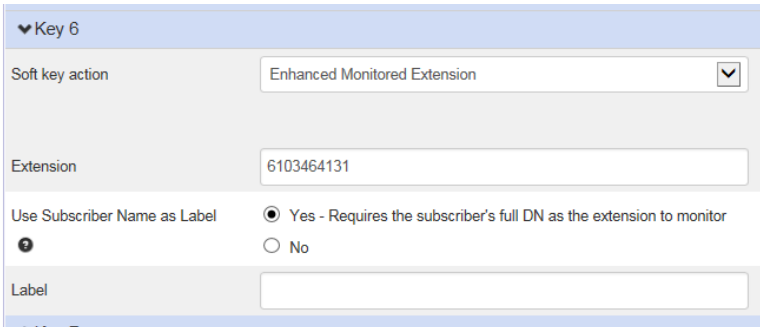
Enhanced Monitored Extension/Speed Dial

Both the Monitored Extension and Speed Dial features also allow you to choose their "enhanced" version on certain models. Doing so allows the user to perform a one-press transfer to the button's destination number or extension. Live calls may be transferred directly to an extension or phone number programmed by simply pressing the button. This is a time-saving feature for high volume reception persons if they normally perform unannounced transfers.

Additionally, Mitel 6800 series phones allow users to enable a ring splash when their monitored extensions ring (see example below). The ring splash is a short ring that will alert the phone user that the other extension is receiving the call. The enhanced monitored extension button can then be pressed to retrieve that ringing call.



Polycom VVX 5.7 firmware and higher allow you to choose whether to download the user name automatically or type it in yourself (see below) for your monitored extensions. If you choose to use the system name, this will use the intercom name. If there is no intercom name, this will show the direct dial phone number. In the example below, the extension for 6103464131 will be monitored on the sixth key of the phone. The phone label will automatically show the intercom name programmed for that line (or, if none is programmed, the phone number will show). Administrators can change the intercom name for all users in the Administrator CommPortal.



Enhanced Call Park

Enhanced Call Park may be configured in a variety of ways depending on the system you have. This function is used as a type of 'group hold'. It may be used to put your caller in a virtual holding place (park orbit) then retrieved from any phone simply by pressing the call park button. The Call Park function must be set up initially by Telesystem. If you are interested in adding this feature, please see your system administrator and they will reach out the Telesystem to see if your system is compatible.

Group Pickup

Your administrator may put your phone and others in a call pickup group, allowing you and the other members to answer each other's phones if you hear them ring. If this group is pre-arranged, the

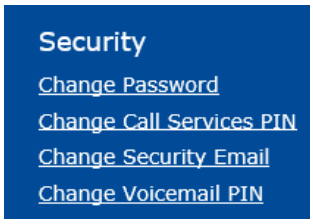
members may answer the other phone's calls by dialing *11 or by utilizing a Group Pickup function key. For more information concerning the setup of call pickup groups, please see the *CommPortal Administrator Guide*.

Directed Pickup
If available, the Directed Pickup option will allow you to answer another person's phone when you hear it ringing. The access code to use this is *12 plus the extension. Alternately, you may configure a Directed Pickup button on an available key using your CommPortal. When configured, you can press this button to answer another person's phone if you hear their phone ringing.

7 Security

The bottom toolbar gives access to various **Security** options:

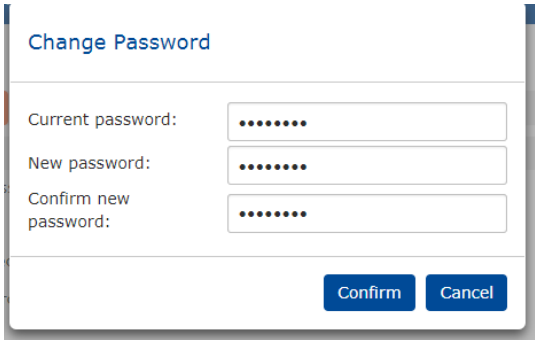
- **Change Password**- modify your CommPortal password
- **Change Call Services PIN**- modify your remote call services password
- **Change Voicemail PIN-** modify your voicemail password
- **Change Security Email-** modify the email linked to your account for password resets



Each of the security options are explained in the sections to follow.

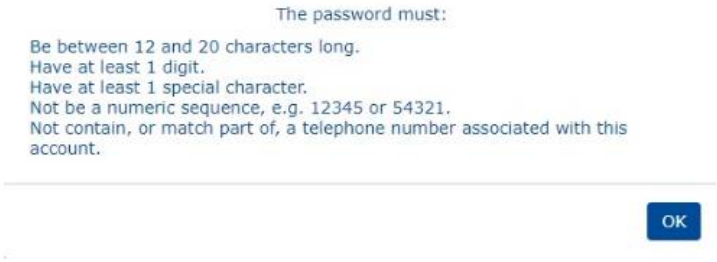
7.1 Change Password

To access the user or CommPortal, an account password is required (see section 1.2). To change this password, click **Change Password** in the Security section, then enter the current password and the new one before clicking **Confirm.**



If the update is completed, you will receive the following notice:

CommPortal account passwords must be 12-20 characters total. It must including at least 1 number, 1 special character and cannot emulate the phone number or have sequential characters. Additionally, you will periodically have to update your CommPortal PIN in which case you will see the following reminder upon logging in:



IMPORTANT NOTE: CommPortal passwords are also used to access the MaX UC softphone. If you are a softphone user, this is the password you will use.

7.2 Change Call Services PIN

The Call Services PIN is a PIN used to manage remote call forwarding. Remote call forward allows you to forward your direct dial number from any phone. The default PIN for this feature is the last four digits of your direct dial number. For example, if your direct dial number is 555-888-1234, your default call services PIN is 1234.

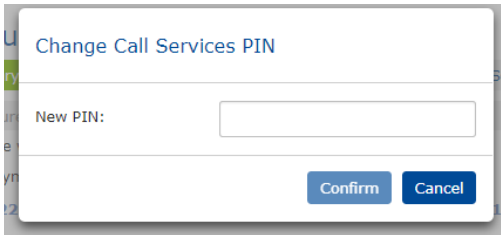
When enabled, this type of forwarding functions the same as the Immediate Forwarding (see section 5.1.2.1). When activated via the remote call forwarding directions below, the number you've activated the forward to will show up in that section.

To use remote call forwarding:

- **Call** 866-963-5666
- **Enter** your ten digit direct number followed by #.
- **Enter** your four digit Call Services PIN followed by #.
- **Enter** the feature code to activate.
  - If you are activating forwarding, dial *72 plus the ten digit number to forward calls to.
  - If you are deactivating forwarding, dial *73.
- You will hear a tone once forwarding is activated to confirm the activation is complete.

To change the Call Services PIN:

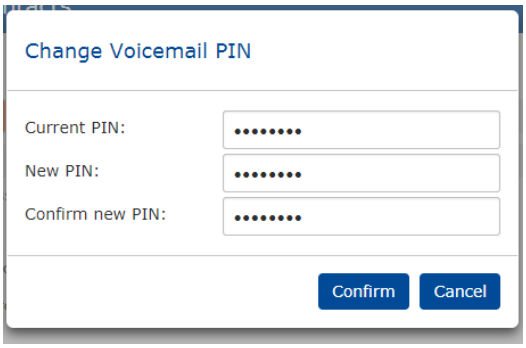
- Click the **Change Call Services PIN** in the bottom toolbar.
- **Enter** your new desired PIN in the New PIN field.
- Click the **Confirm** button.



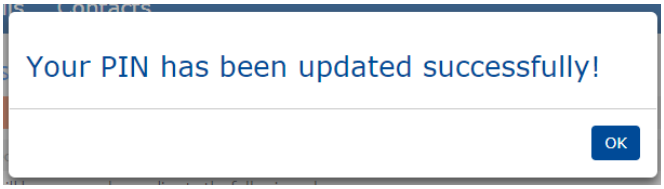
7.3 Change Voicemail PIN

To access voicemail, a voicemail PIN (password) is required.

To change your PIN, click **Change Voicemail PIN** in the Security section, **enter** the current and new PIN, then click **Confirm.**



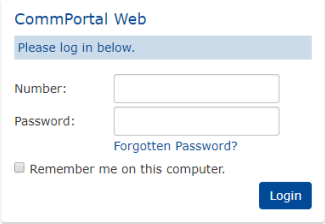
If the update is completed, you will receive the following notice:

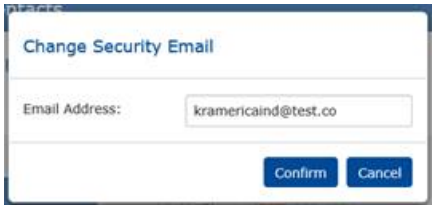


Voicemail PINs 4-20 digits long depending on the type of services on the account.

7.4 Change Security Email

To access the user commportal and other account applications, an application password is required as noted in section 7.1. The *Change Security Email* field allows an email address to be linked to the account in case a password reset is needed. This allows users to reset their own password using the *Forgotten Password?* link on the login screen to change their password.

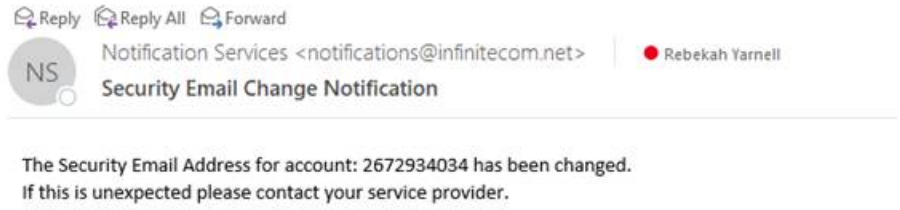




To change your Security Email, click **Change Security Email** in the *Security* section, enter the new email address, then click **Confirm**.

The confirmation popup will appear:

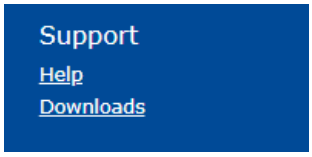
The confirmation email will look similar to the following:



Be sure that the @telesystem.us sender is marked as 'safe' to ensure you get all system emails.

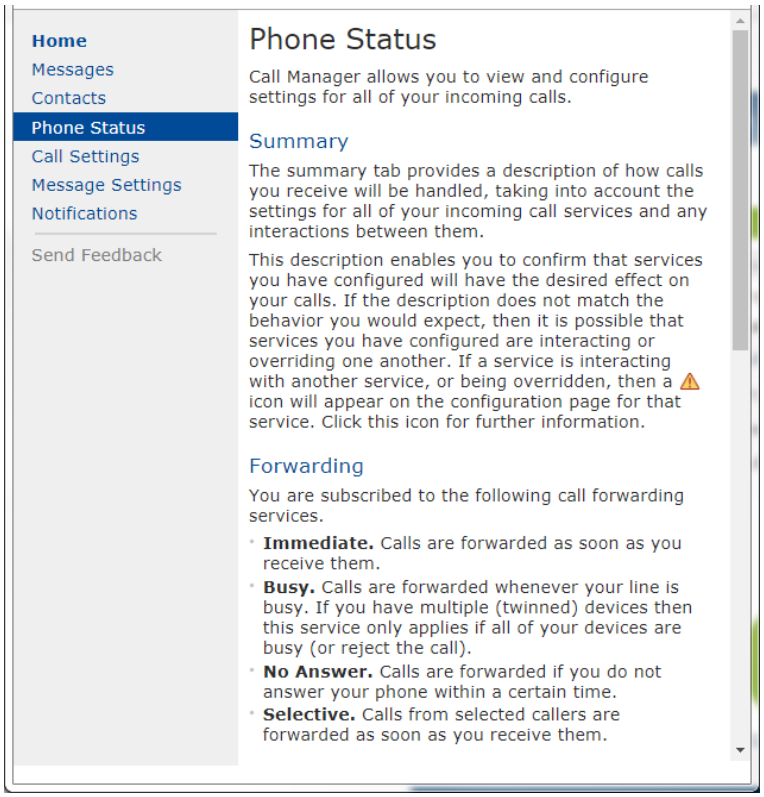
8 Support

The Support section of the lower toolbar offers basic ways to get assistance on navigating the portal and access to any available downloads.



8.1 Help

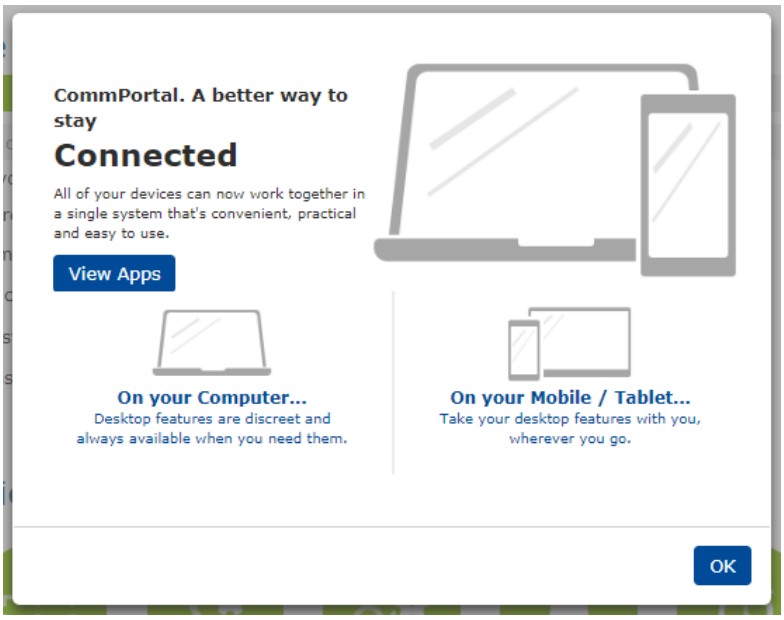
If you need assistance while logged into the CommPortal, click the Help link. This will trigger another browser window to open with assistance for basic features and functionality of the portal.



Navigate the Help section using the sections on the left pane. The section that opens when you initially click on 'help' is usually the section you are currently viewing.

8.2 Downloads

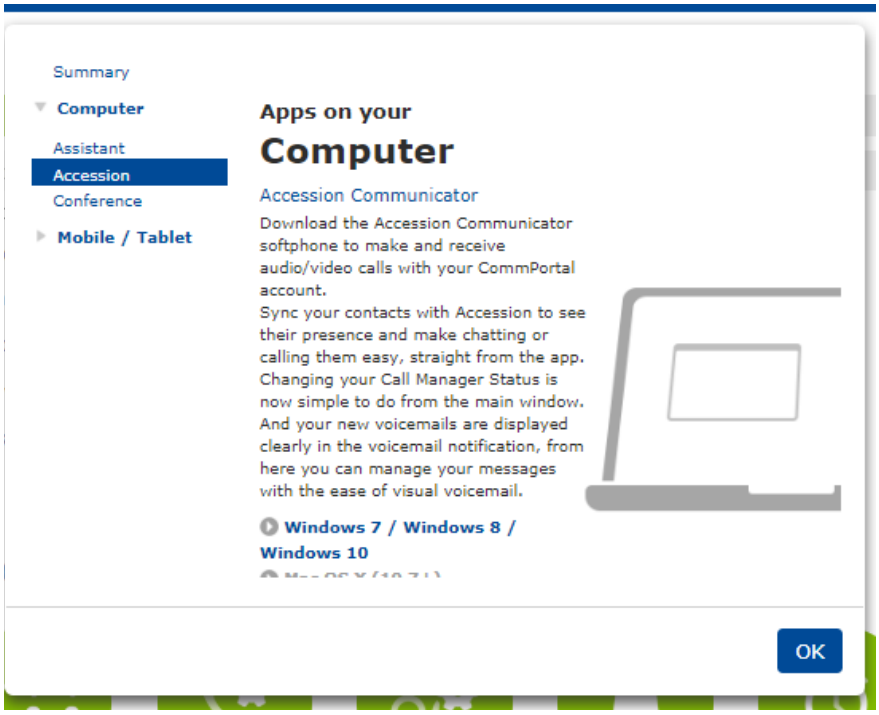
Some services may have access to additional applications that can be downloaded. Click on the Downloads link to view these.



When you first view downloads, they may be separated as shown above- by computer for mobile. Clicking on each will give a short summary of the application and the compatible browsers or other third party environments for each. You may download these applications by clicking on the appropriate link. You will need your CommPortal credentials (see section 1.2) to properly utilize these applications.

8.2.1 Apps for the Computer

If enabled on the account, the basic applications found in the apps section may include the following. To navigate between the applications, click on the application's name in the left pane. All pertinent information and available platforms will be listed in the right pane.



- **Assistant.** This application logs you into the CommPortal Assistant automatically and minimizes discretely on your toolbar as a small icon and a toolbar. More information and options on this application are in the section that follows. See Assistant Installation section for full download and use instructions.
- **MaX UC.** This is a softphone application. It may be used to make and take calls via your computer. If other users in your business group are soft phone users, you will be able to use additional chat and presence functionality as well.
- **Conference.** Basic conferencing setup (if you have conference bridge enabled).

8.2.2 Apps for Mobile/Tablet

If this service is enabled on the account, the MaX UC softphone application may be installed on your mobile phone or tablet.

The download of these applications can be accessed through your mobile device's App Store (iPhone/iPad users) or Google Play (Android phone users). Please see section 8.2.3.4 or find guides and downloads at https://www.telesystem.us/UC-Green.

8.2.3 Application Installation and Basic Use

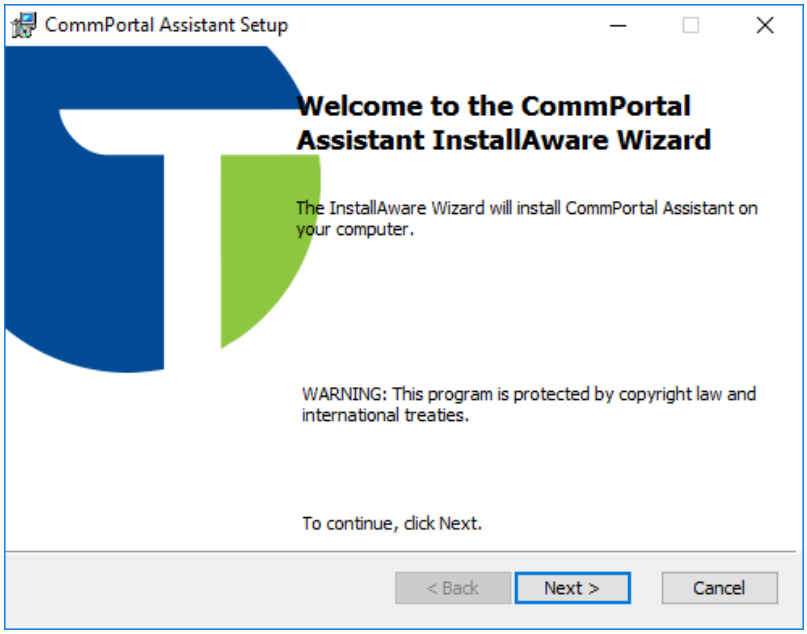
The Download section can use used to download any of the computer applications. Most downloads are triggered by simply clicking on the desired download and following the prompts to install. All applications will require you to know your CommPortal credentials.

8.2.3.1 CommPortal Assistant Installation

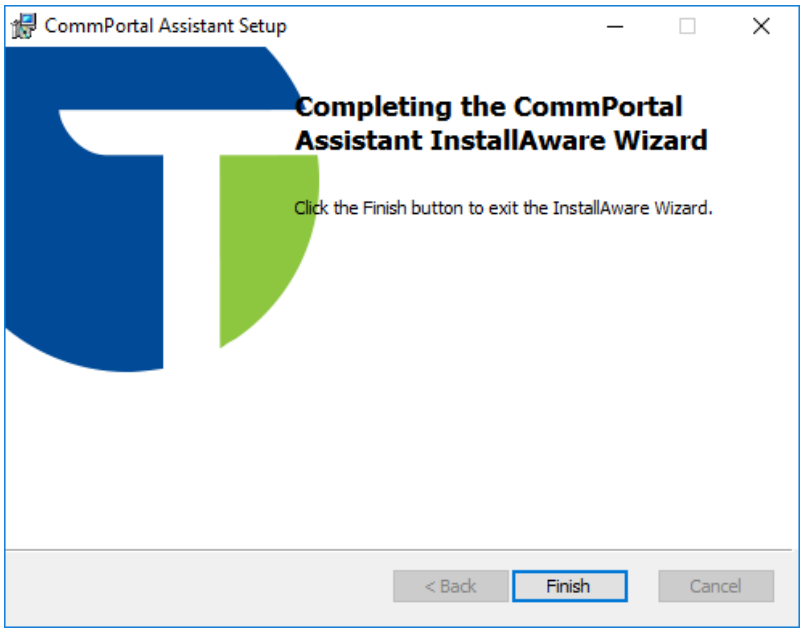
To begin the installation process for the Assistant, click its link for relevant platforms in the download section. Most of the computer applications are similar in the manner they are installed, but the example below specifically applies to the Assistant application.

Most browsers will first offer a popup window to confirm that you want to proceed with the installation process. Click the Run and/or Yes button to proceed with the download. This will engage the CommPortal setup Wizard.

Keep clicking the Next button (see below) to use the default settings for the installation.



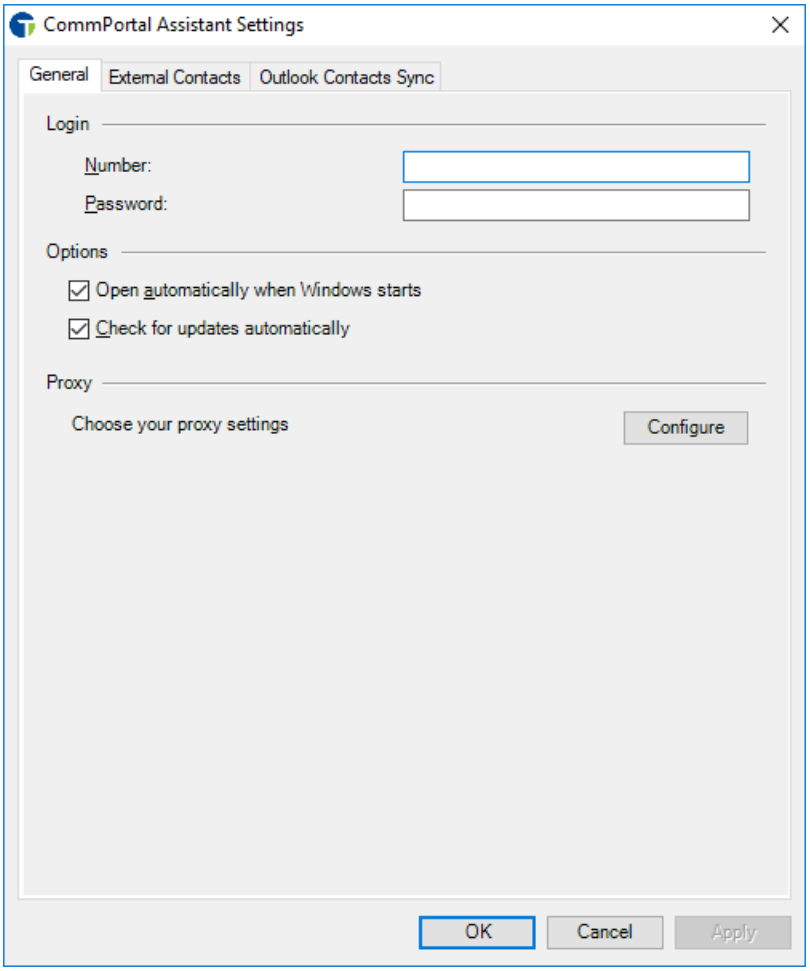
Keep clicking Next and Install until the installation is complete. The completion screen is shown below:



Click Finish to complete the installation and close the install wizard. Your computer may require a restart.

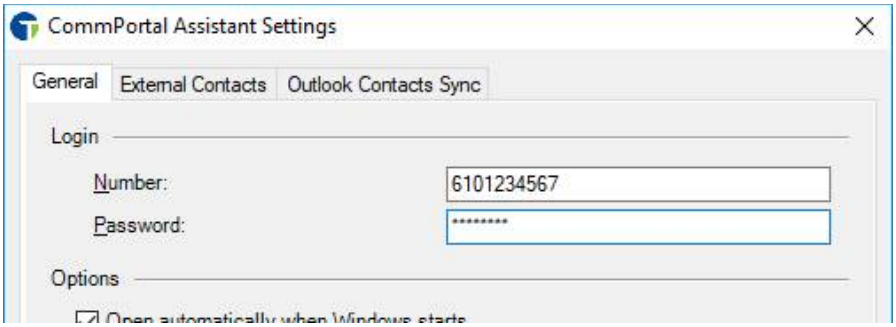
After the assistant has been installed and launched, the Settings screen below will automatically open so that you can configure your login information. Alternately, a small Assistant icon will appear on your PC taskbar. You may also get to the Settings screen by right clicking on the Assistant icon and choosing *Settings*.

In order to allow the assistant to log in, you must correctly complete the information in the Settings section shown below.



Number: Input your account telephone number with no dashes or spaces
Password: Input your account password you usually use to log into the CommPortal (see 7.1)

For example, if your direct dial number is 6101234567 and you use the password 45674567 to access your CommPortal, your settings screen login will be as shown below.



Click **OK** to apply the settings. This will log you into the Assistant application. The Taskbar icon should show that you are connected. At any time you may right click the icon for Settings, access to the CommPortal, syncing options, and a help section.

8.2.3.2 CommPortal Assistant Icon

The Assistant application is composed to two main parts: the Notification Area Icon and the Windows Toolbar. After you have put in the correct credentials, you may utilize one or both of these features.

The Notification Area Icon gives you quick access to the settings of the application and changes based on the state of your account. The icon statuses are as follows:

You have new messages
If you have new messages, you may double click on the icon to bring up the CommPortal then go to the Messages section. Alternately, right click on the icon and choose the View Messages option from the menu.

Connected to the server
Being connected to the server means that you are properly logged into the application. To launch the CommPortal application, double click on the icon.

Disconnected from the server
If you are disconnected from the server, means that the login to the system has failed. You may check your login credentials by right clicking on the icon and choosing Settings. Follow the instructions as described to ensure you have input the proper information.

There is an Outlook Contacts synchronization conflict
Check you sync settings by right clicking on the icon and going to the Settings- Outlook Contacts Sync section.

Notification Area Icon Menu

Right clicking on the notification icon will bring up a menu with the following options:

- **View Messages:** opens the CommPortal assistant to the Messages section.
- **Open Dashboard:** opens the CommPortal assistant to the Dashboard section.
- **Place Calls From:** tells your computer where to dial calls from when utilizing the dial option in the Windows toolbar. When *My Phone* is selected, the direct dial number assigned to your phone will be used. Alternately, you may choose Enter Number to input another device's number that you would like to use (cell phone, house phone, etc).
- **Outlook Contacts Sync:** opens the Settings to the Outlook Contacts Sync section.
- **Settings:** opens the configuration options for the application.
- **Check for Updates:** allows you to manually check whether you are using the most recent version of the application.
- **Help:** opens up a help section for the application.
- **About:** gives information about the version and licensing of the application.
- **Exit:** exits the application.

8.2.3.3 CommPortal Assistant Windows Toolbar

In addition to the notification icon, you may also utilize the windows toolbar to easily dial calls from your computer, search contacts, and change call manager settings.

To open the toolbar:

- **Right click** on an empty area of the Windows taskbar
- Select **Toolbars** from the menu
- Choose the entry for **CommPortal Assistant**. The following toolbar will appear on your taskbar:

To dial using the toolbar:

- **Click** on the text box of the tool bar (the hint text will disappear)
- **Type** your search text to search from your existing contacts or type in a telephone number you would like to dial.
- To call the contact, **select** it with the mouse or press enter after selecting the desired entry.
- The telephone number you have selected for the Place Calls From setting (see above) will be called first. When you answer at that destination, the call will be sent from that device to the telephone number you are calling.

Changing the incoming call settings with the Toolbar

The icon by the toolbar indicates your current incoming call settings.

Ring my (desk) phone

Forward calls

Click on the icon to change your settings for incoming calls.

You may choose to sync the contacts from your local outlook contacts and your CommPortal contacts. The CommPortal can store up to 1000 contacts. To set this up:

- Right click on the Notification Icon and choose **Settings**

- Go to **Outlook Contacts Sync**
- **Checkmark** the Enable Synchronization box
- **Choose** how the synchronization should be handled:
    - **In Both Directions** will keep the Outlook and CommPortal contacts the same, merging in both directions. *Note that with this option if you delete a contact in the Portal, it will delete it in Outlook.*
    - **To Outlook Only** will replace any existing Outlook contacts with your CommPortal contacts.
    - **From Outlook Only** will replace any existing CommPortal contacts with your local Outlook contacts. This is the most common choice.
- **Select** which local contacts folder to sync with. Most people only have one, however you may select several if you have more.

Alternately, if you have access to a Microsoft Active directory or another LDAP server, then you may use this to add to your contact list.

- Right click on the Notification Icon and choose **Settings**
- Go to **External Contacts**
- **Choose** the *Use a different directory* setting
- **Input** the settings for the LDAP server in the Manual Settings section then press the OK button. These details are specific to your network. If you are unsure of what information to input here, see your network administrator.

8.2.3.4 MaX UC Installation

If MaX UC Communicator softphone services have been added to the account, you may use the Downloads section to download it to your desktop.

Please note that the MaX UC Communicator is a premium feature that must be configured by Telesystem to allow access to one or both softphones. If you are interested in adding this feature, please contact your system administrator or Telesystem directly.

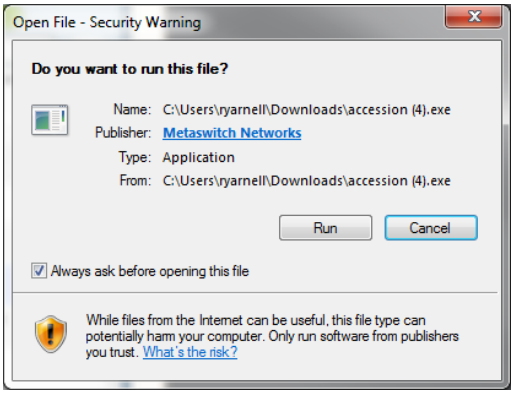
Basic installation instructions are below. Please navigate to https://www.telesystem.us/UC-Green for complete guides and feature information.

MaX UC mobile is supported on Android 6.0 and above and iOS 11.0 and above MaX UC on desktop is supported on Windows 8 (desktop edition) and 10 or Mac OS x10.12 or later.

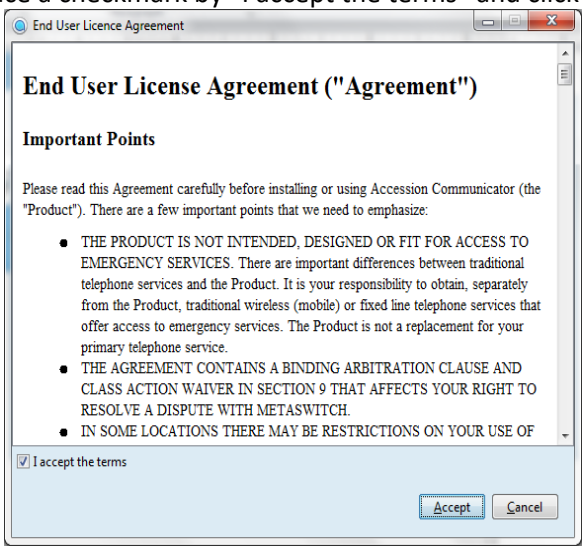
If you have the MaX UC Desktop client license must be enabled on your account for the application to work properly.

To download the desktop MaX UC softphone:

- Click the **Downloads** link
- Click the **On Your Computer**
- Click on the appropriate platform (Windows or MAC) to initiate the download
- When the download of the exe file completes, Choose to *Run* the file to launch the Setup Wizard.



- Allow the Setup Wizard to complete by clicking on the *Next* and *Install and Finish* options on the following screens to complete the installation.
- If the application does not launch automatically, you may do so by choosing the *MaX UC* on the start menu or desktop.
- When asked to select a service provider, click on the drop down then choose **Telesystem** from the list**.**
- To log in, enter your CommPortal phone number and current CommPortal password (see 7.1 for password information) as your credentials. Then, click the Log in button.
- The first time you install MaX UC Communicator, be sure to read the End User License Agreement then place a checkmark by "I accept the terms" and click Accept.



- If credentials were entered properly in the previous step, MaX UC will now launch for the first time and downloads all CommPortal contacts automatically.