



Lightpath Hosted Voice
CommPortal User Guide

v06-02-15

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1 Introducing CommPortal

CommPortal provides a web interface to your phone settings and allows you to

- view recent calls
- view and listen to your voicemails
- set up your contacts
- change your phone's and phone system's settings.

1.1 Accessing

To access CommPortal point a browser at <https://lightpathhostedvoice.com/>

CommPortal is supported on Windows 2000 and later, using the following browser versions:

- Internet Explorer 6 or later (IE8 or later required for some functions)
- Firefox V3 or later
- Google Chrome version 4 or later (Windows only)

JavaScript must be enabled on your browser.

CommPortal is also supported on Mac OS X10.6 and later on Safari version 5 or later (Mac OS X only).

1.2 Logging in

The following shows a sample CommPortal login page.

Figure 1: CommPortal login page

To log into CommPortal enter your phone number and your password, and click on *Login*.

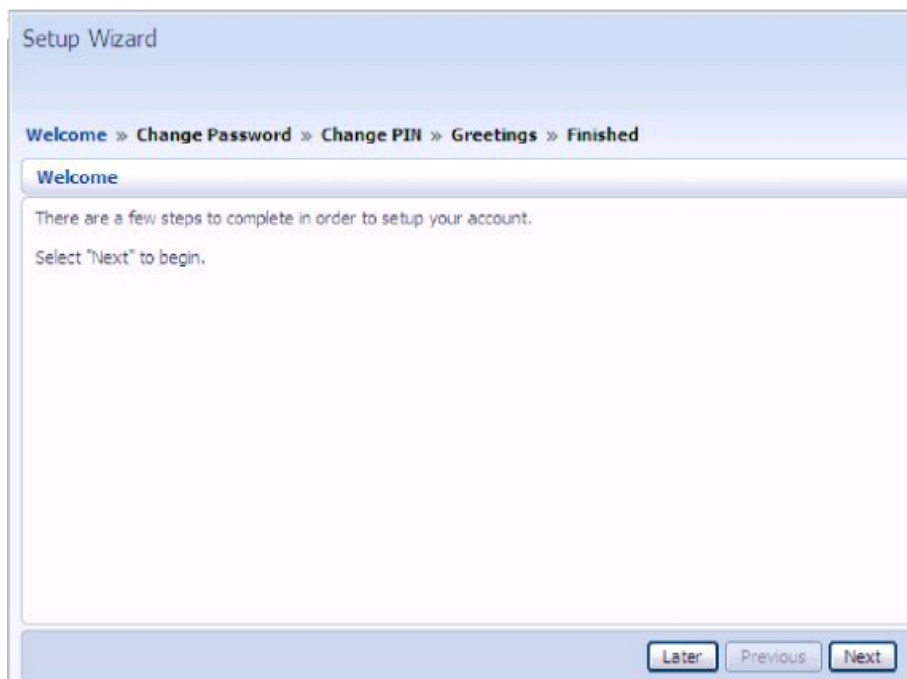
If you are using a public computer, do not tick the *Remember me on this computer* checkbox and always make sure you explicitly log out of CommPortal when you have finished, as described in 1.6, to protect your account from being accessed by other users.

Your telephony provider may require you to change your password periodically. If your password has expired, you will see a screen prompting you to change it.

1.2.1 Using the CommPortal initialization wizard

In some systems, you may need to complete an initialization wizard to set up your account when you log in to CommPortal for the first time. This will prompt you to change your password and, if you have one, your PIN, and record your name and a default greeting which will be played each time a caller accesses your CommPortal mailbox.

Figure 2: CommPortal Initialization Wizard



- From the Welcome screen, click *Next* to begin.
- Follow the instructions to change your password.
 - You must complete this step before you can access your account, but you can use the TUI to do this if you prefer.

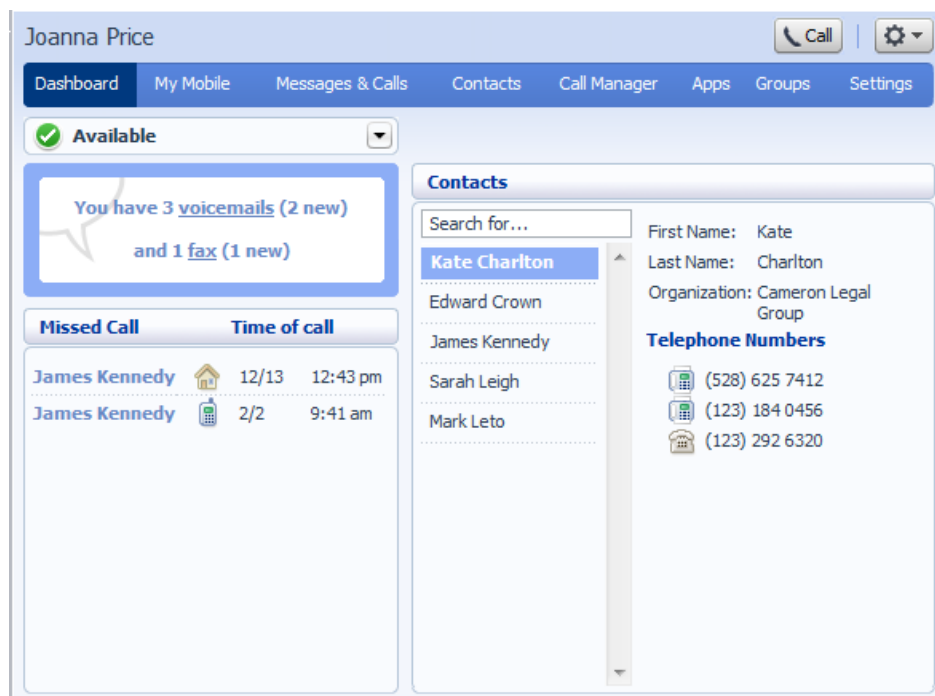
- In some systems, there may be password checks to ensure that you choose a password that cannot easily be guessed by a malicious user. If you choose a password that does not pass these checks, for example because it includes your telephone number, you will see an explanation and be prompted to enter a different password.
- When you have successfully entered your new password, click *Next* to continue to the next step.
- Now, if you have one, change your PIN, and click *Next*.
- If you have a microphone on your computer, you may want to record your spoken name and initial greeting now, but you can click *Later* if you do not want to do this now.

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

1.3 Using CommPortal

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

Figure 3: CommPortal Dashboard




Along the top of the window are a series of tabs which you can select to take you to the different pages within CommPortal. You will only see tabs for the services that you are subscribed to.

- **Dashboard.** This is the at-a-glance summary you see when you first log into CommPortal.
- **Messages & Calls.** This shows you all of your voice, fax and video messages, and the calls you've made, answered or missed.
- **Contacts.** You can add and view all of your contacts and their phone numbers in this tab.
- **Call Manager.** The Call Manager page lets you configure the incoming call and call forwarding services on your phone line, like Call Forwarding and Selective Call Rejection.
- **Reminders.** This page allows you to set up reminder calls.
- **Groups.** Here you can view any groups your line belongs to, such as hunt groups. You can also login and logout of groups here.
- **Settings.** The Settings page gives you access to numerous other options, such as changing your passwords and PINs, and configuring the keys on your phone.

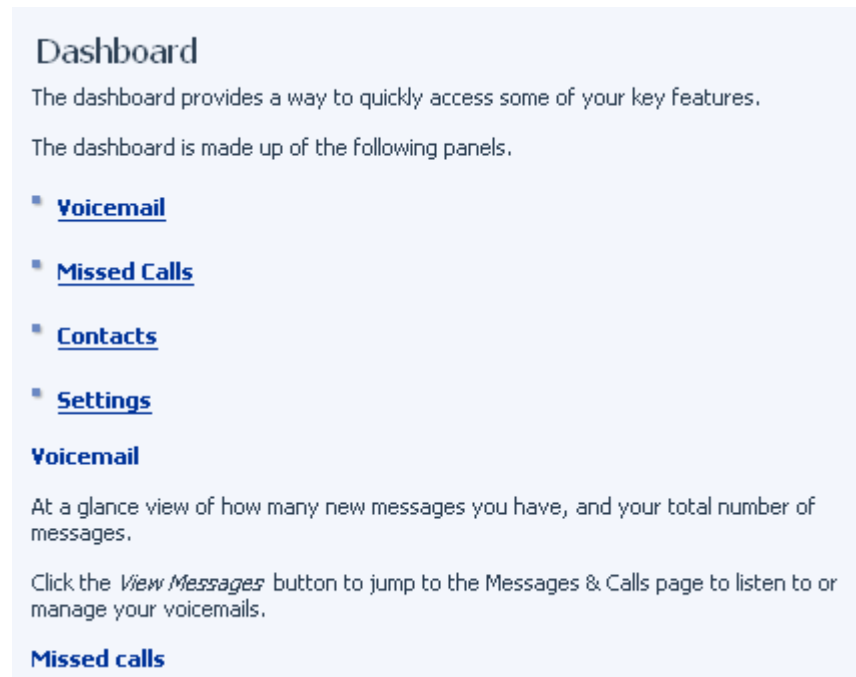
Using the functions in each of these pages is described in more detail in the rest of this document.

1.4 Getting help


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

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


Figure 4: CommPortal Help



1.5 Refreshing a page

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

1.6 Logging out

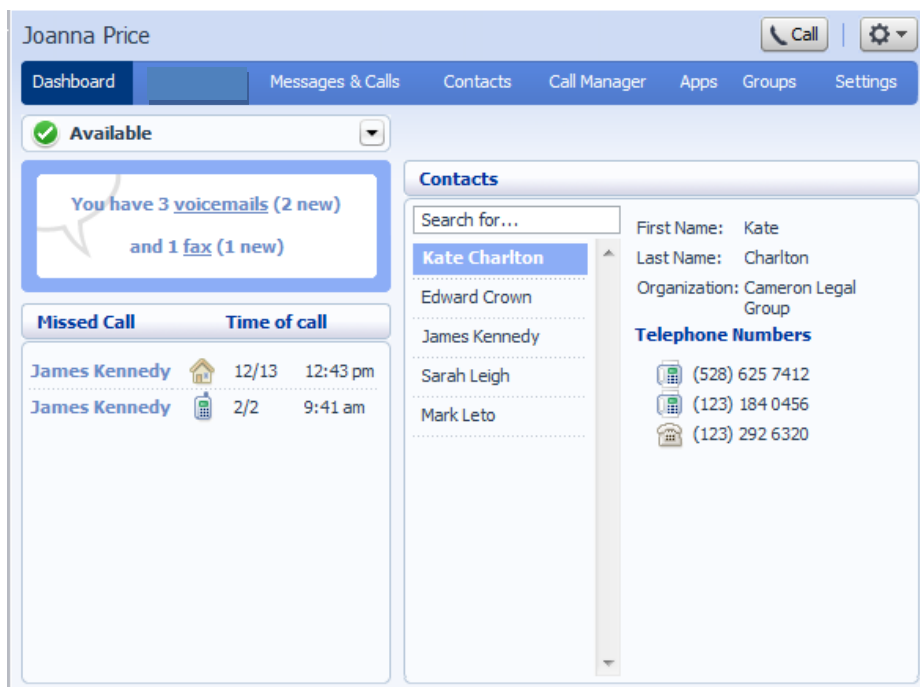
If you don't use CommPortal for 30 minutes you will be automatically logged out. However, if you wish to manually log out, for example because you've been accessing CommPortal using a shared computer, you can do this by clicking the More Options icon  and then selecting Logout.

2 CommPortal Dashboard

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

Here is an example Dashboard:

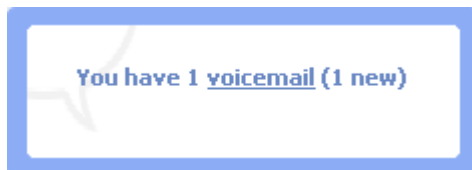
Figure 5: CommPortal Dashboard



2.1 Messages

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

Figure 6: CommPortal Dashboard New Voice Message Count





To view and listen to new messages, click on the *voicemail* link. This will take you to the Messages & Calls page, which is described in Section 3.

2.2 Missed calls

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

Figure 7: CommPortal Dashboard Missed Calls display

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

To see other types of calls, go the Messages & Calls page, described in Section 3.

2.2.1 Call back

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

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

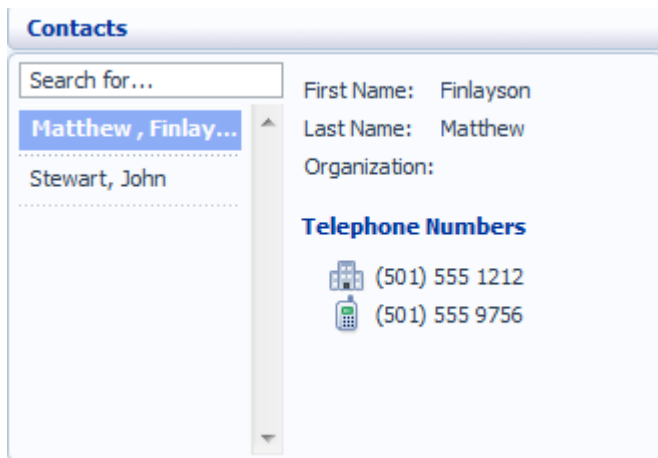
Figure 8: Call back pop up

Missed Call	Time of call
Unknown	11/2 12:43 pm
(208) 362 2087	9/26 12:43 pm
Dial (208) 362 2087 from 6 (534) 789 6543	
Dial (208) 362 2087 from other number...	
(208) 362 2244	9/24 4:19 pm

2.3 Contacts

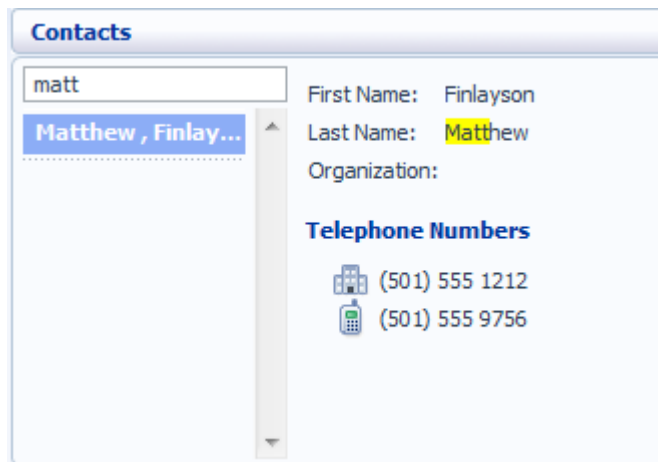
The Contacts section displays all of your contacts and allows you to search them:

Figure 9: CommPortal Dashboard Contacts display



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

Figure 10: Search Contacts



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

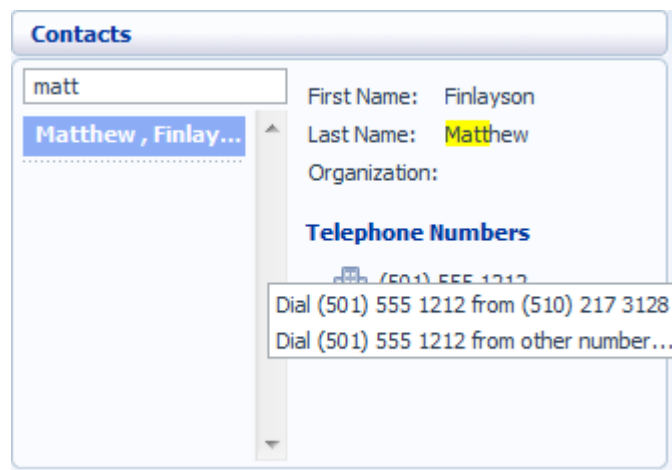
To add, modify or delete contacts, see Section 4.

2.3.1 Calling a contact

To call a contact using Click To Dial, follow these steps:

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

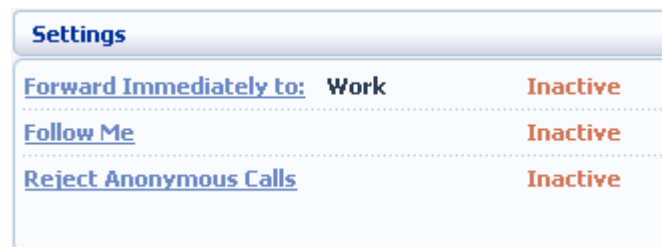
Figure 11: Click To Dial pop up



2.4 Settings

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

Figure 12: CommPortal Dashboard Settings display



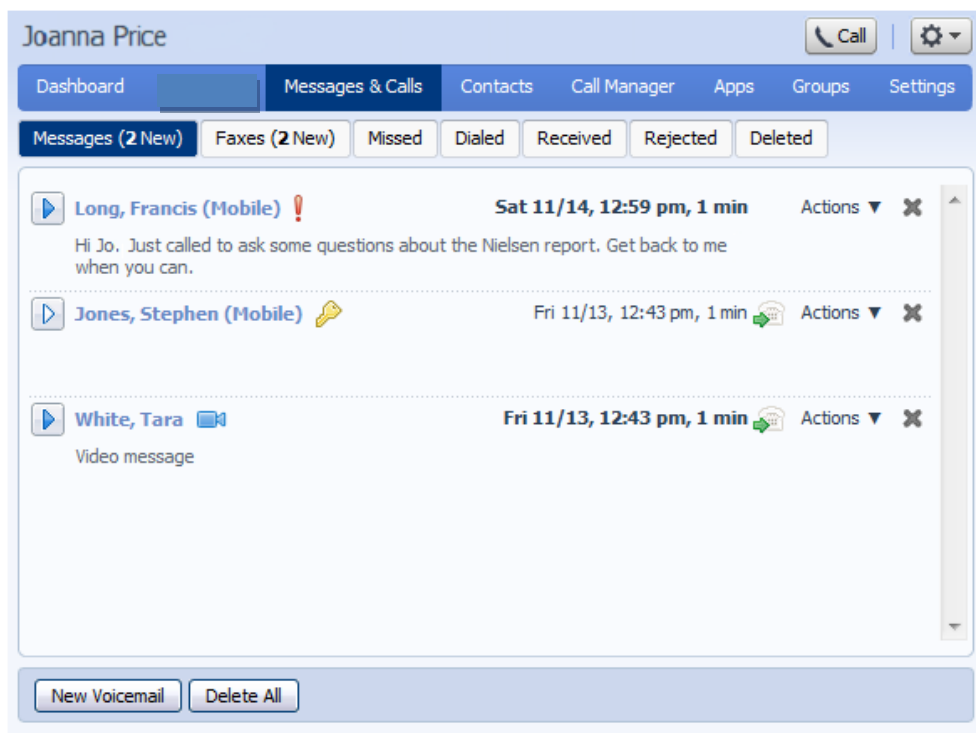
In the example above Call Forwarding Immediate, the Follow Me service and Anonymous Call Rejection are all inactive (disabled).

To change one of these settings you can either click on the link for that setting, or select the Call Manager page, described in Section 5.

3 Messages & Calls

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

Figure 13: CommPortal Messages & Calls page



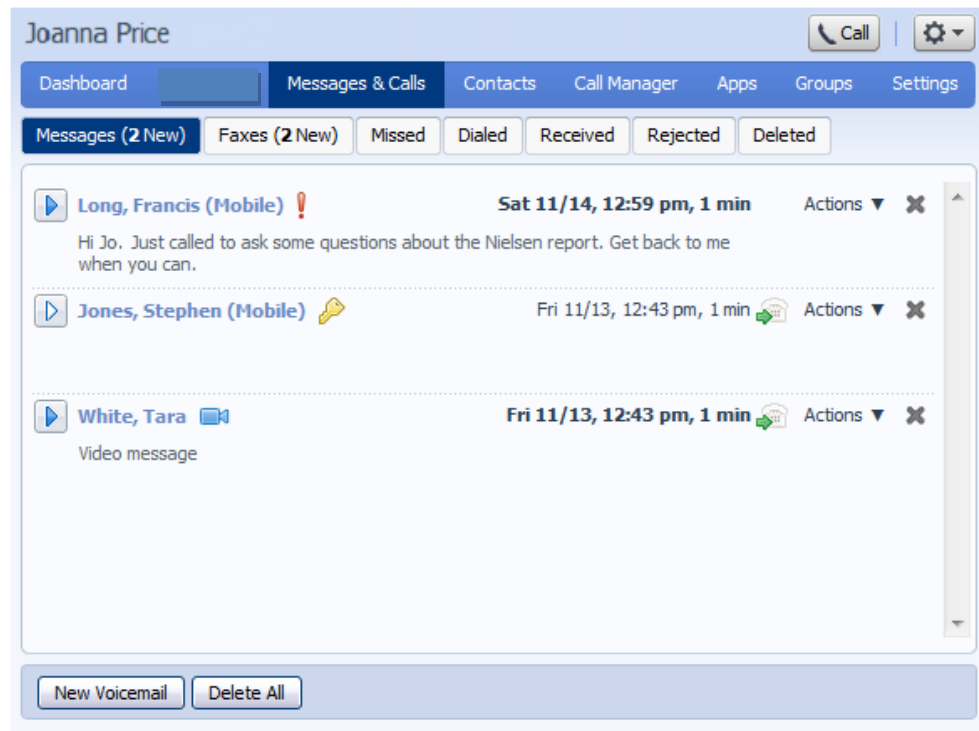
- The *Messages* tab shows you all of your new and stored voice messages.
- The *Faxes* tab shows you any new and stored fax messages.
- The *Missed* tab displays the recent calls you have received and not answered.
- The *Dialed* tab displays the recent calls you have made, including those made by Click To Dial as described in Section 8.
- The *Received* tab shows the recent calls you have answered.
- The *Rejected* tab shows the recent calls that you have rejected
- In some systems, you will see a *Deleted* tab, which shows any messages that you have deleted on the other tabs.

These tabs are described in more detail below.

3.1 Messages

This shows you all stored voice messages, both those you have listened to and those you haven't. Unheard messages are shown in bold:

Figure 14: Messages & Calls – Messages tab

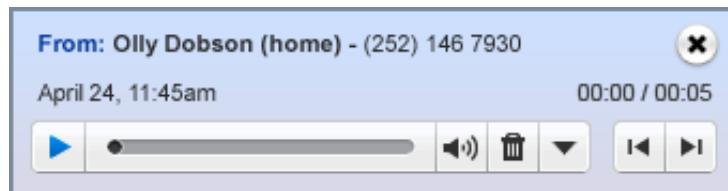


3.1.1 Listen to a message

To listen to a message click on the play icon to the left of the message: .

This will pop up a Voicemail player which loads and plays the message.

Figure 15: Voicemail Player



With this player you can:

- See when the message was received and how long it is.
- Pause, rewind and fast forward the message.
- Mute the player or change the volume.
- Delete the message, or Save it to disk.
- Close the player.

3.1.2 Deleting a message

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

- In some systems, the message will be permanently deleted.
- In some systems, the message will be moved to the *Deleted* tab described in section 3.6.

3.1.3 Marking a message as heard

Listening to a voice message will mark it as heard. If you want to mark a message as heard without listening to it, follow these steps:


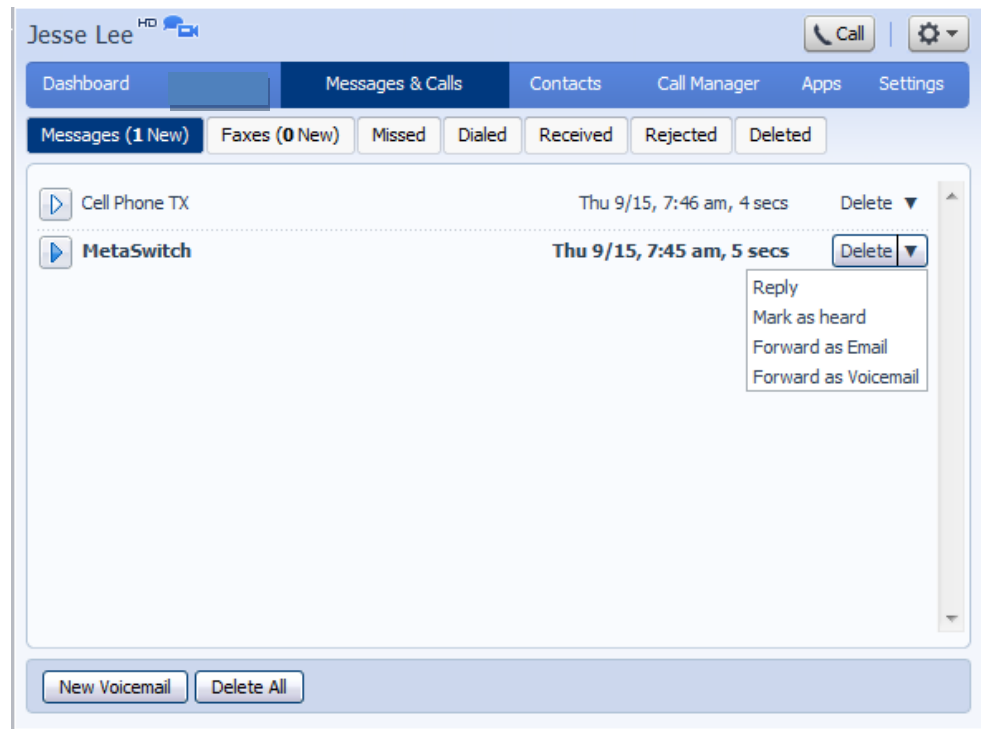
- Click on the  icon to the right of the message and select Mark as heard from the dropdown.

Figure 16: Message options drop down menu



3.1.4 Marking a message as new

To mark a message as new, follow these steps:

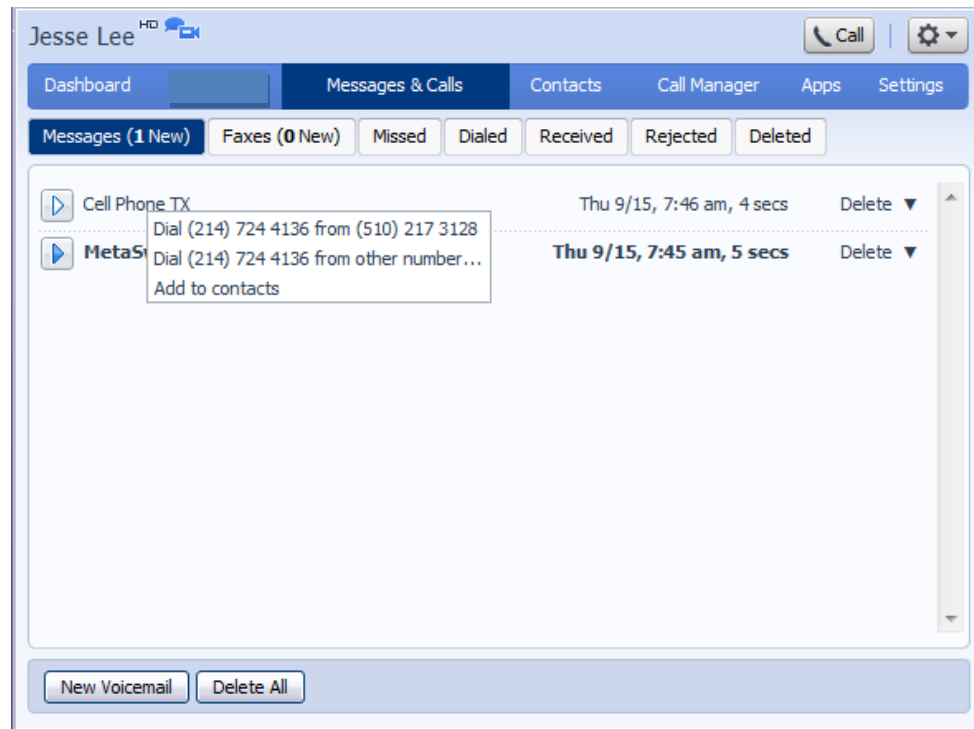
1. Click on the ▼ icon to the right of the message, as shown in Figure 16.
2. Select Mark as new from the dropdown.

3.1.5 Call back

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

1. Click on the number or name of the caller.
2. Select the *Dial* option.

Figure 17: Call back message sender



3.1.6 Add caller to contacts

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

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 4 for more information on using the Contacts page.

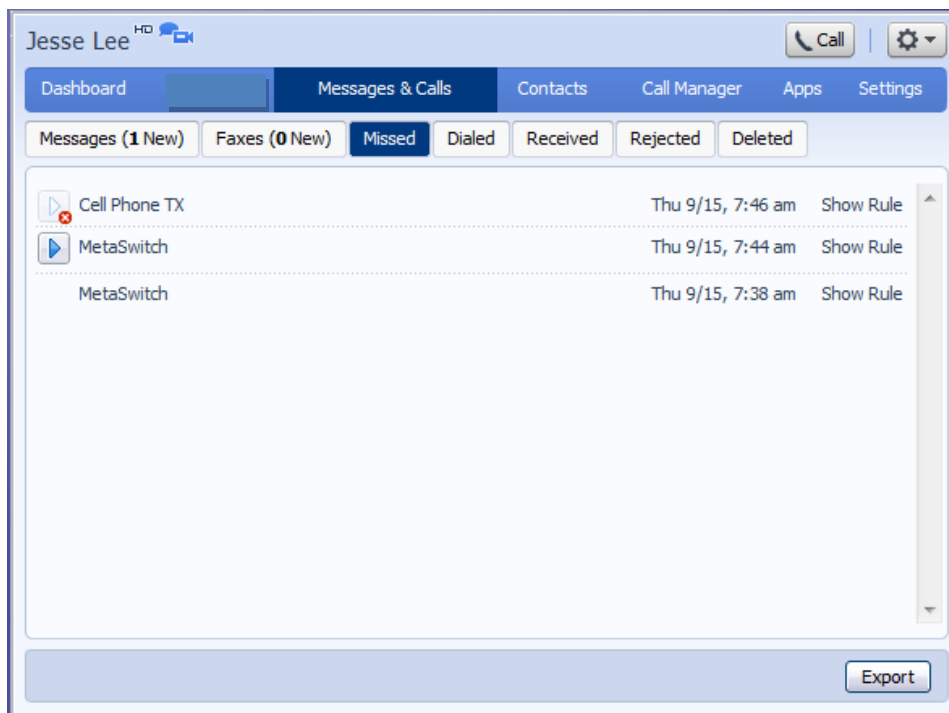
3.2 Faxes

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

3.3 Missed

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

Figure 18: Messages & Calls – Missed tab



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

3.3.1 Add caller to contacts

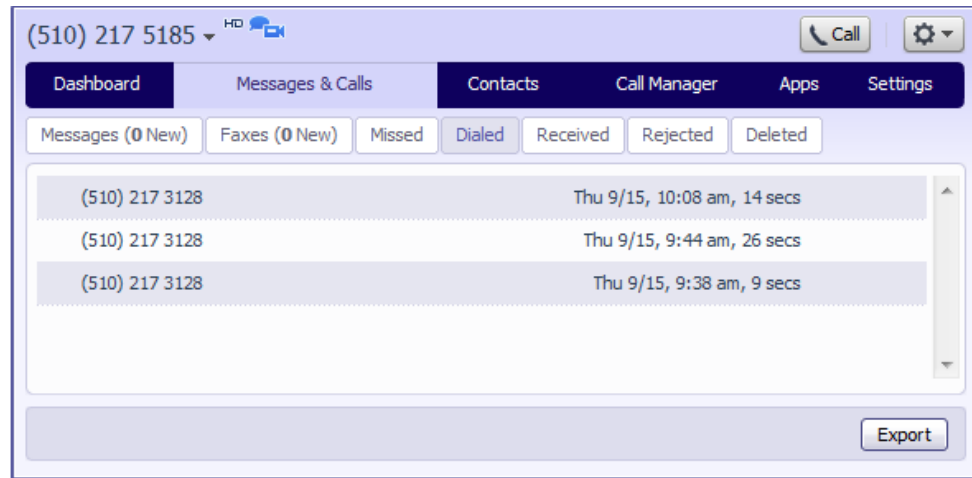
To add the number of someone who called you to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 4 for more information on this.

3.4 Dialed

This page shows you all of the recent calls you have made, including those which you made using Click To Dial (described in Section 8):

Figure 19: Messages & Calls – Dialed tab



3.4.1 Add dialed number to contacts

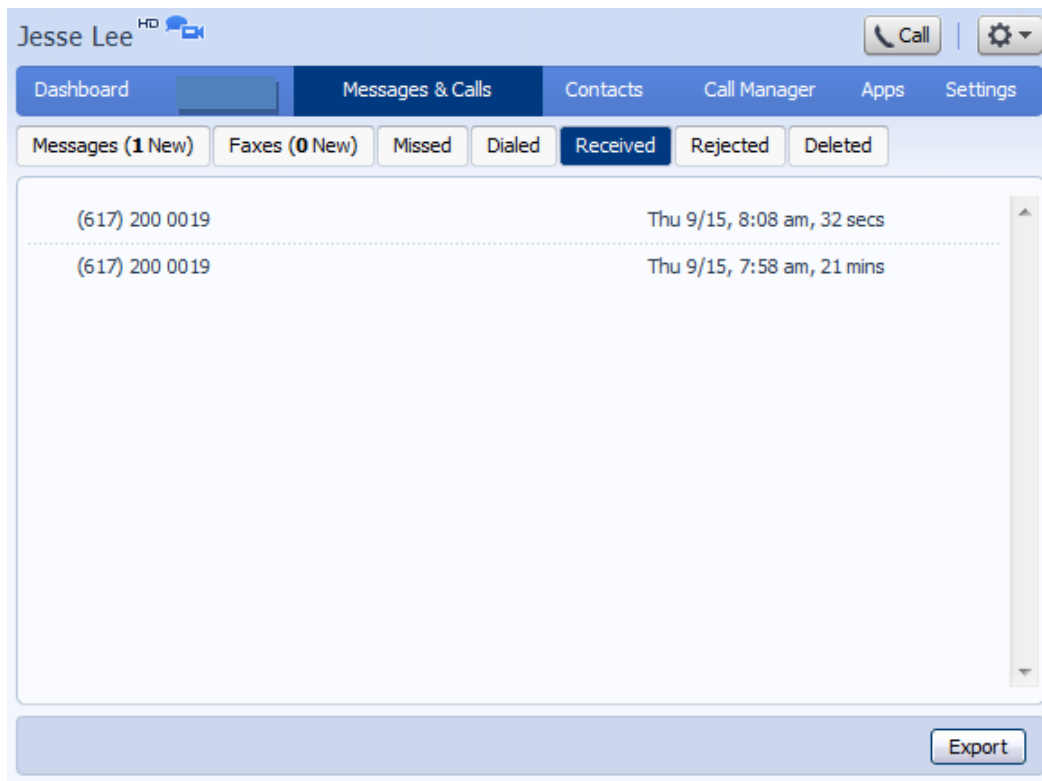
To add the number of someone you called to you to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 4 for more information on using the Contacts page.

3.5 Received

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

Figure 20: Messages & Calls – Received tab



3.5.1 Add number to contacts

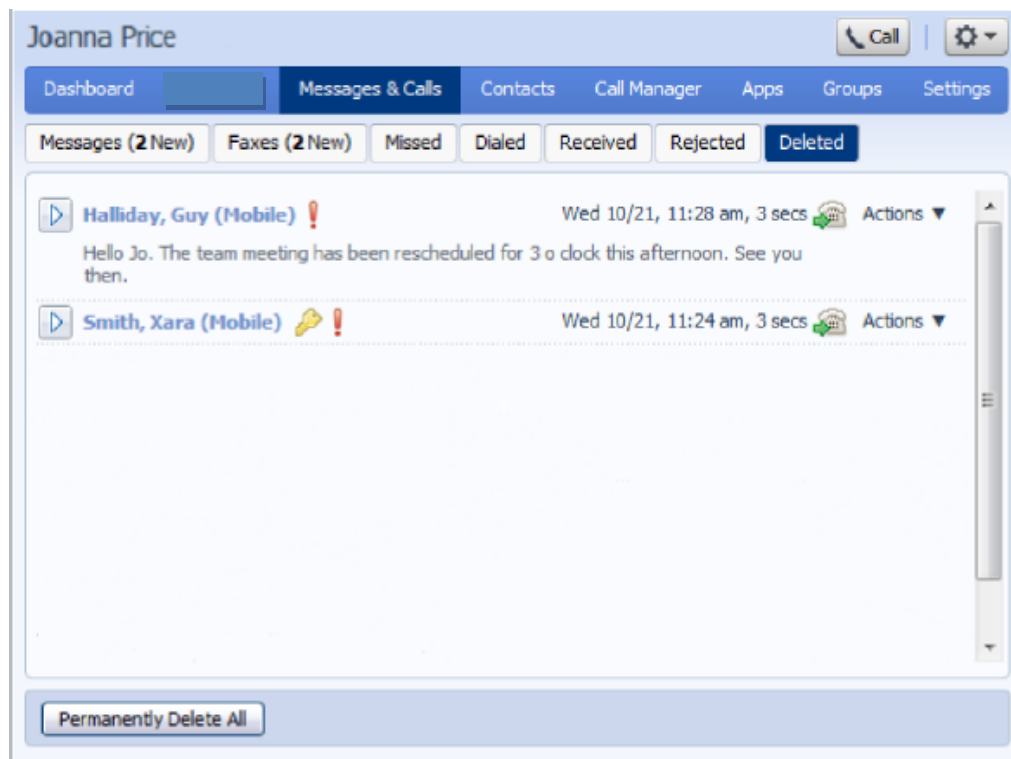
To add the number of someone who called you to your to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 4 for more information on using the Contacts page.

3.6 Deleted


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

Figure 21: Messages & Calls - Deleted Tab



3.6.1 Listen to deleted messages

To listen to messages on this tab:


1. Click the play icon to the left of the message: 
2. Use the Voicemail Player described in section 3.1.1.
3. Click the *Restore* button on the Voicemail player if you want to return this message to the *Messages* tab.

3.6.2 View deleted faxes

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

3.6.3 Restoring deleted messages and faxes

To restore messages and faxes:

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

3.6.4 Permanently delete messages

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

To delete a single item:

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

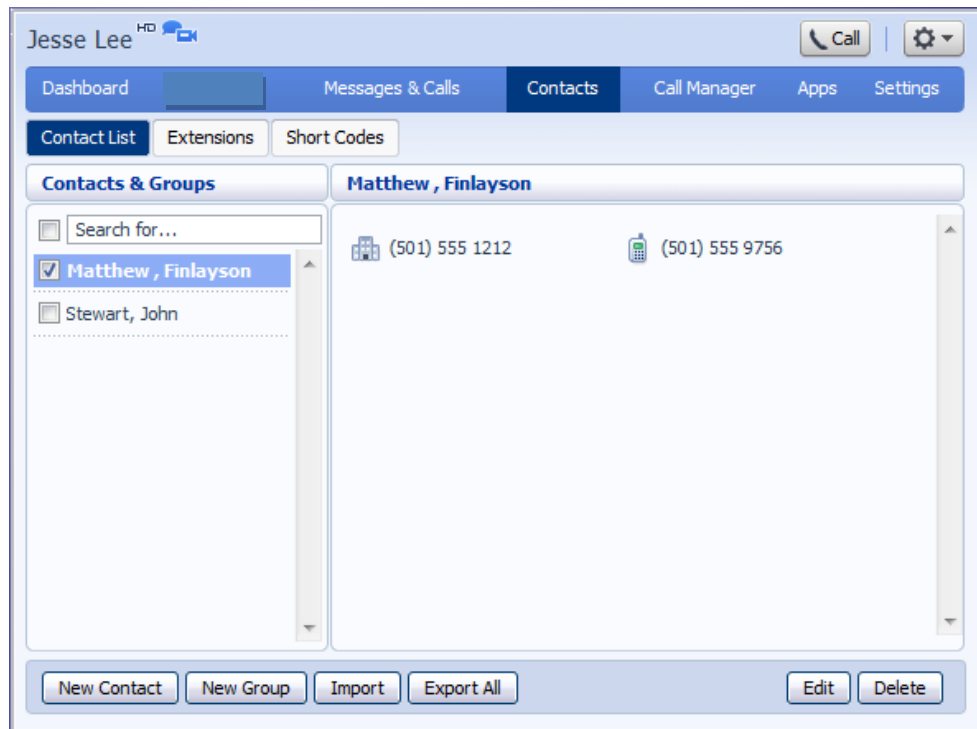
To delete all the messages and faxes on this tab:

1. Click the *Permanently Delete All* button at the bottom left of the page.

4 Contacts

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

Figure 22: CommPortal Contacts page



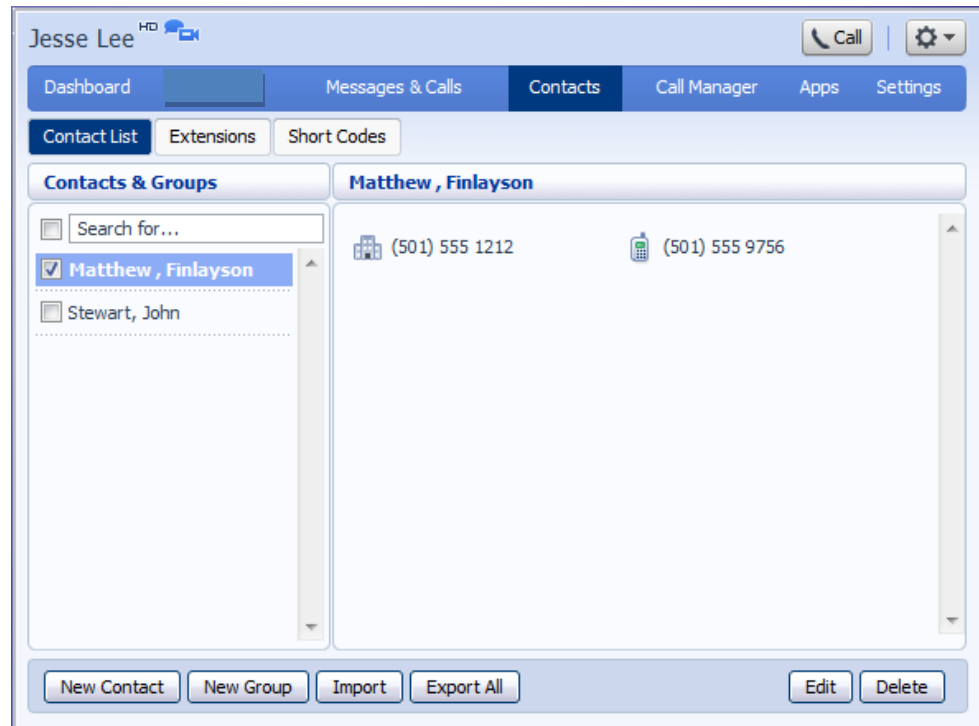
- The Contact List tab allows you to manage your personal contact list.
- The Speed Dials tab is where you configure your numeric speed dials (if your phone supports these).
- The Extensions tab shows you the extensions within your business.
- The Short Codes tab shows you your business's numeric speed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

Each of these sections is described in more detail below.

4.1 Contact List

The Contact List shows you all of your contacts:

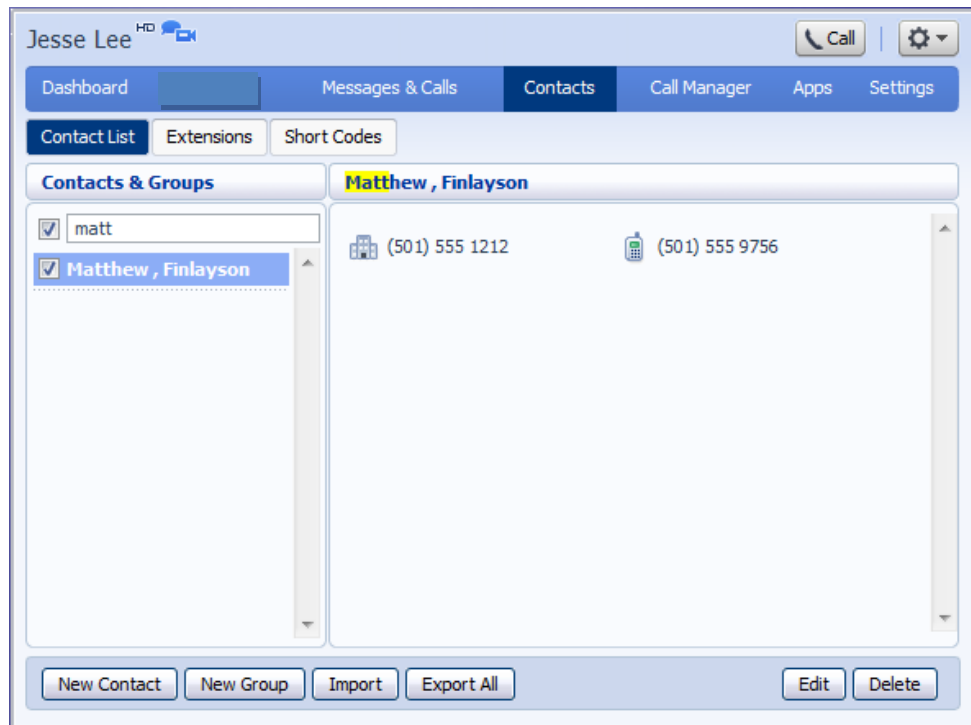
Figure 23: Contacts – Contact List tab



4.1.1 Searching

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

Figure 24: Search contacts



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

4.1.2 Add a new contact

To add a new contact, follow these steps:

- Click on New Contact.

Figure 25: CommPortal new contact page

Jesse Lee ^{HD}

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

Contact List Extensions Short Codes

Contacts & Groups

☐ matt

☐ Matthew, Finlayson

First Name

Last Name

Nickname

Job Title

Organization

Home ☐

Work ☐

Mobile ☐

Fax ☐

Other ☐

Save Cancel

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

Figure 26: Completed new contact form

Jesse Lee ^{HD}

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

Contact List Extensions Short Codes

Contacts & Groups

☐ matt

☐ Matthew, Finlayson

First Name

Last Name

Nickname

Job Title

Organization

Home ☐

Work ☐

Mobile ☐

Fax ☐

Other ☐

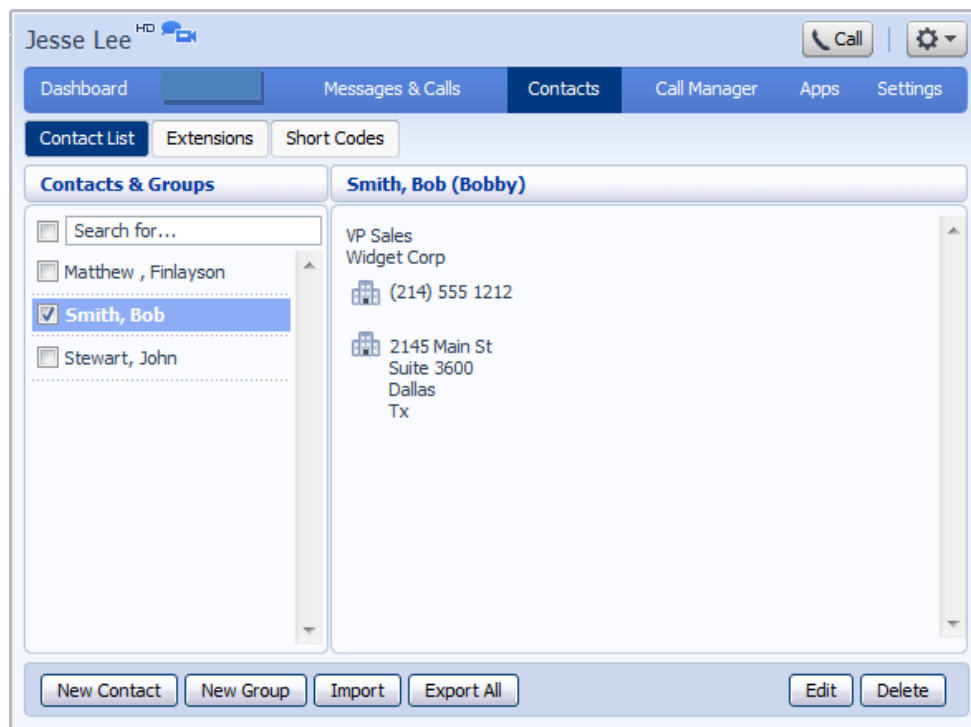
Save Cancel

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

Figure 27: CommPortal new contact page

The screenshot displays the CommPortal interface for adding a new contact. The top header shows the user 'Jesse Lee' with a video call icon. The main navigation bar includes 'Dashboard', 'Messages & Calls', 'Contacts' (highlighted), 'Call Manager', 'Apps', and 'Settings'. Below this, a sub-navigation bar shows 'Contact List', 'Extensions', and 'Short Codes'. The 'Contact List' sub-tab is active, showing a list of contacts: 'matt' and 'Matthew, Finlayson'. The 'Matthew, Finlayson' contact is selected. To the right of the contact list is a form for adding or editing contact information. The form has two sections. The top section is for a home address, with fields for Address, City, State, ZIP, and Country. The bottom section is for a business address, with fields for Address and City. At the bottom of the form are 'Save' and 'Cancel' buttons.

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

Figure 28: CommPortal contact details

4.1.3 Editing a contact

To edit a contact, follow these steps:

1. Select the contact you wish to edit from the list on the left hand side of the screen.
2. Click *Edit*.
3. Modify or add any details.
4. Click *Save*.

4.1.4 Deleting a contact

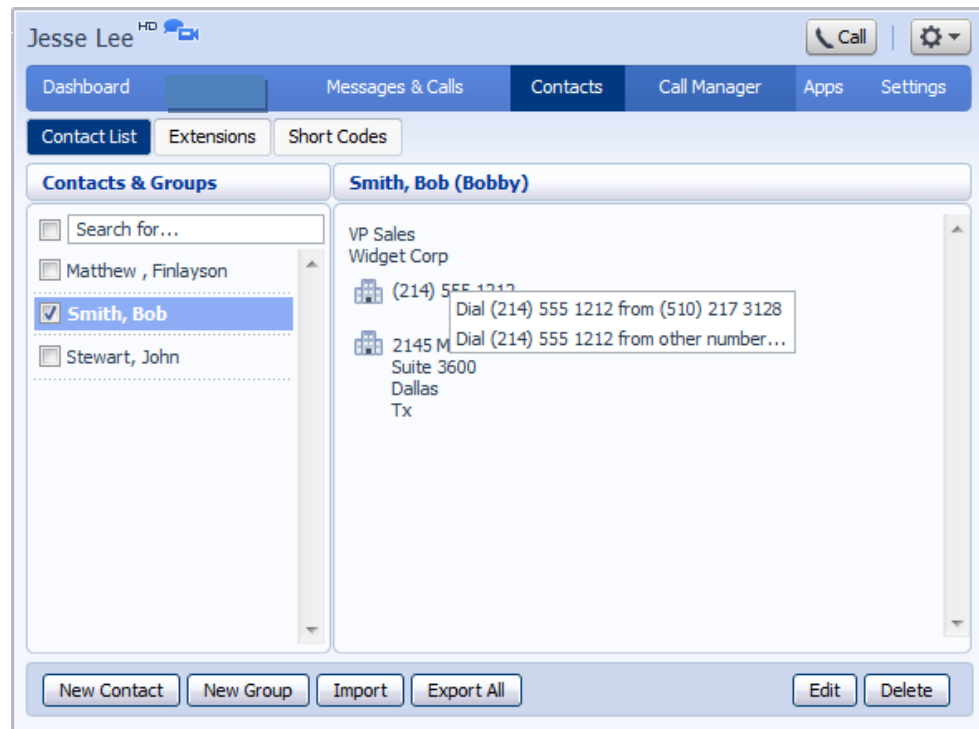
To delete a contact, follow these steps:

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

4.1.5 Calling a contact

To call a contact using Click To Dial, follow these steps:

1. Click on the number of the contact you wish to call.
2. Select the *Dial* option.

Figure 29: Calling a contact from the Contact List tab

4.1.6 Groups

You can manage your contacts by assigning them to groups. For example you might have a group for “Work” contacts and another group for “Personal” contacts.

To add a new group, follow these steps:

- Click on New Group.

Figure 30: Adding a new group

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

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

Figure 31: Adding a new group

Jesse Lee ^{HD}

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

Contact List Extensions Short Codes

Contacts & Groups **Group:** **Group Members**

☐ Search for...

☐ Matthew, Finlayson

☐ Smith, Bob

☐ Stewart, John

Group Name VIP

Telephone ID 1

☒ Matthew, Finlayson

☐ Smith, Bob

☐ Stewart, John

Save Cancel

- Click on Save.

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

Figure 32: Adding a new group

Jesse Lee ^{HD}

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

Contact List Extensions Short Codes

Contacts & Groups **Group: VIP** **Group Members**

☐ Search for...

☒ VIP

☐ Matthew, Finlayson

☐ Smith, Bob

☐ Stewart, John

VIP

Telephone ID: 1

Search for...

Matthew, Finlayson

New Contact New Group Import Export All Edit Delete

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

To edit a group, follow these steps:

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

To delete a group, follow these steps:

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

4.2 Speed Dials

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

Figure 33: Contacts – Speed Dials tab

The screenshot shows the 'Speed Dials' tab within the 'Contacts' section of the CommPortal interface. The user is 'Dan Smith'. The interface includes a navigation bar with 'Dashboard', 'Messages & Calls', 'Contacts' (selected), 'Call Manager', 'Apps', and 'Settings'. Below this is a sub-navigation bar with 'Contact List', 'Speed Dials' (selected), 'Extensions', and 'Short Codes'. A descriptive text states: 'Makes dialing faster by allowing you to assign a one or two digit code to speed dial to different telephone numbers. One digit codes can range from 2-9. Two digit codes can range from 20-49.' The main area is divided into two sections: 'Speed Dial' and 'Number'. The 'Speed Dial' section shows 'You have no speed dials set up.' with a vertical scrollbar. The 'Number' section has a 'New Speed Dial' header, a 'Speed Dial' dropdown menu set to '2', a 'Number' input field, and an 'Add' button. At the bottom, there are 'Clear List', 'Apply', and 'Cancel' buttons.

You use these speed dials by dialing the one or two digit speed dial number from your phone. They are different from speed dials which are assigned to particular keys on your phone. For more information on setting up speed dials on your phone's keys see Section 9.

4.2.1 Adding a speed dial

To add a speed dial, follow these steps:

1. Select the number for the speed dial you'd like to set up from the Speed Dial drop down list.
2. Enter the number this speed dial should call, as you would dial it. For example, if you dial 9 before a number, enter 9 and the number here.
3. Click on *Add*.
4. Repeat steps 1-3 for any other speed dials you want to set up.
5. Click on *Apply* to save your changes.

Figure 34: Adding a speed dial

The screenshot shows the 'Speed Dials' section of the CommPortal interface. At the top, there's a header with the phone number '(510) 217 5185' and a 'Call' button. Below this is a navigation bar with tabs: 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', and 'Settings'. Under 'Call Manager', there are sub-tabs: 'Contact List', 'Speed Dials' (which is active), 'Extensions', and 'Short Codes'. A descriptive text states: 'Makes dialing faster by allowing you to assign a one or two digit code to speed dial to different telephone numbers. One digit codes can range from 2-9. Two digit codes can range from 20-49.' Below this is a table with two columns: 'Speed Dial' and 'Number'. It contains two entries: '2' with number '(214) 555 4242' and '3' with number '(510) 555 1212'. Each entry has a cross icon to its right. To the right of the table is a 'New Speed Dial' form with a 'Speed Dial' dropdown menu (set to '4'), a 'Number' input field, and an 'Add' button. At the bottom of the interface are 'Clear List', 'Apply', and 'Cancel' buttons.

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

New Speed Dial

Speed Dial: 4
Number:
Add

Clear List Apply Cancel

4.2.2 Deleting a speed dial

To delete a speed dial, follow these steps:

1. Click on the Cross icon to the right of the speed dial: ✕.
2. Click on *Apply*.

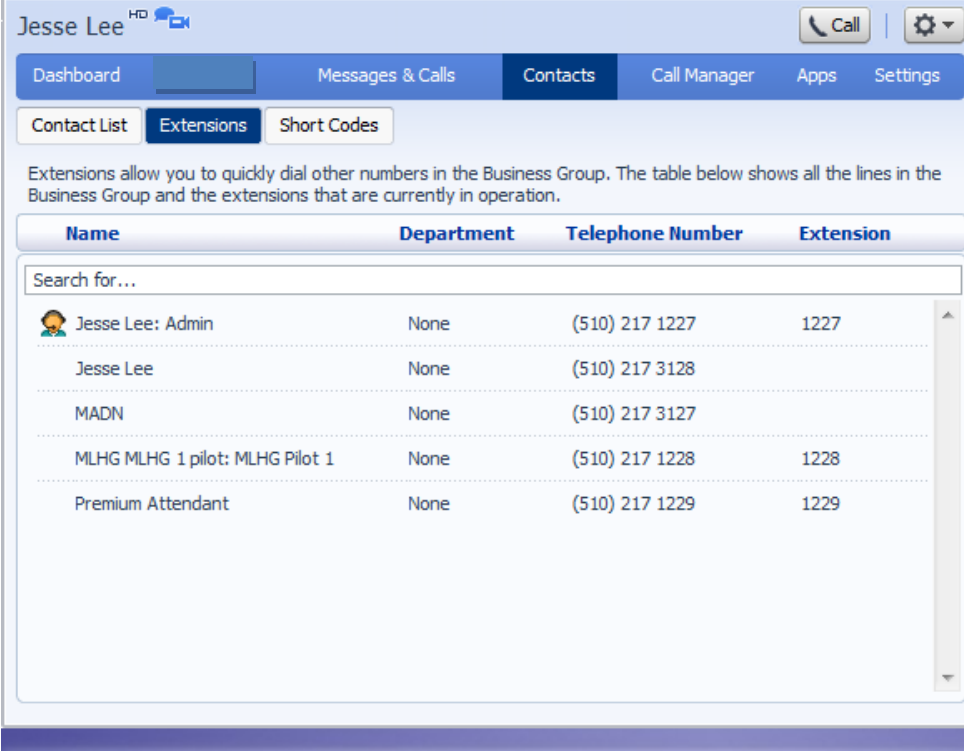
Alternatively to delete all of your speed dials, follow these steps:

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

4.3 Extensions

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

Figure 35: Contacts – Extensions tab





The screenshot shows the 'Contacts' tab in the CommPortal interface. The 'Extensions' sub-tab is selected, displaying a table of extensions. The table has columns for Name, Department, Telephone Number, and Extension. A search bar is located above the table. The table lists five extensions: Jesse Lee: Admin (1227), Jesse Lee (3128), MADN (3127), MLHG MLHG 1 pilot; MLHG Pilot 1 (1228), and Premium Attendant (1229). All departments are listed as 'None'.

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

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

1. Click on the number of the extension you wish to call.
2. Select the *Dial* option.


Figure 36: Using Click To Dial from the Extensions tab

Jesse Lee ^{HD}  

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

Contact List **Extensions** Short Codes

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

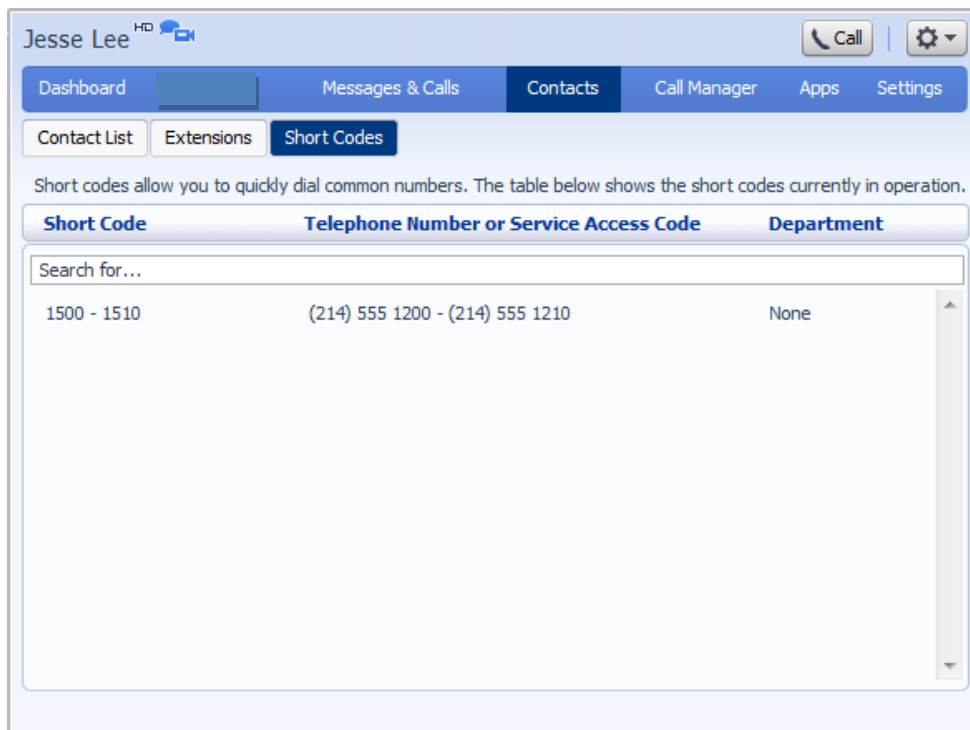
Name	Department	Telephone Number	Extension
Search for...			
 Jesse Lee: Admin	None	(510) 217 1227	
Jesse Lee	None	(510) 217 1227	
MADN	None	(510) 217 3127	
MLHG MLHG 1 pilot: MLHG Pilot 1	None	(510) 217 1228	1228
Premium Attendant	None	(510) 217 1229	1229

Your administrator sets up these extensions.

4.4 Short codes

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

Figure 37: Contacts – Short Codes tab



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

5 Call Manager

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

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




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

Each of these sections is described in more detail below.

5.1 Summary

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

Figure 38: CommPortal Incoming Call Manager summary page

Jesse Lee   

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

Summary Rules Weekly Schedule Special Days

When I receive a call

☐ Ring my phone

☒ Forward to (214) 724 4136

☐ Send to voicemail

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

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

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

Additional options

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

If I don't answer:

☐ Forward to <enter a number>

Apply Cancel

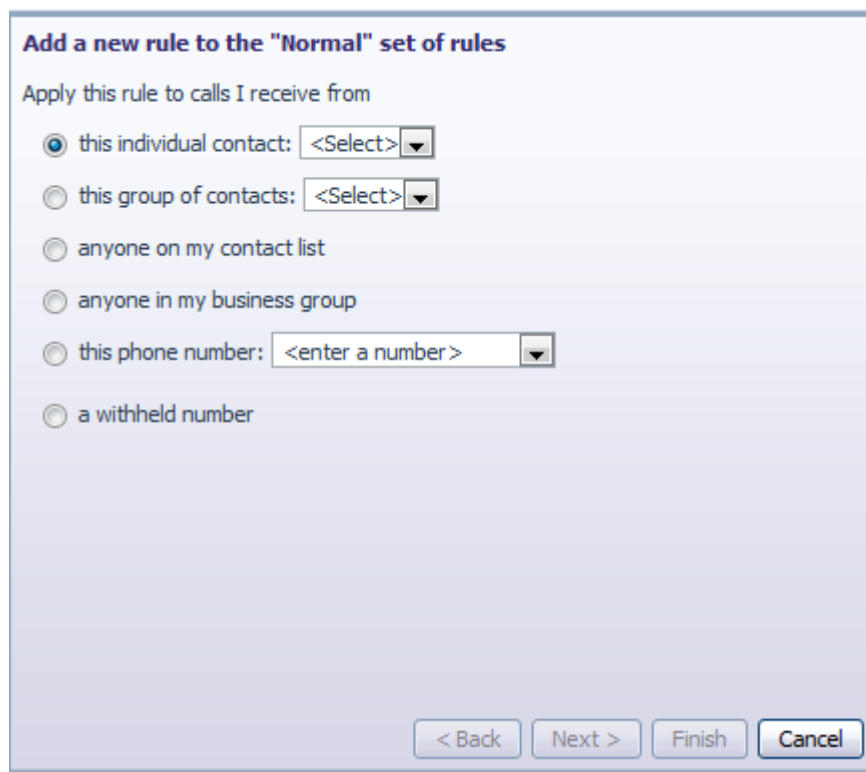
5.2 Rules based routing

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

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

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

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

Figure 39: Adding a new rule

The screenshot shows a dialog box titled "Add a new rule to the 'Normal' set of rules". Below the title, it says "Apply this rule to calls I receive from". There are six radio button options, each followed by a text field or label:

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

At the bottom right, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

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

- This individual contact - Apply to individual contact (in your contact directory)
- This group of contacts - Apply to a group of contacts as defined in my contact directory.
- Anyone in my contact list – Apply to all callers for which you have a contact defined.
- Anyone in my business group – Apply to all other members of your business, with the Hosted Voice service.
- This phone number – Apply to a specific phone number. Can be any number.
- A withheld number – Apply to any caller who has restricted their calling number.

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

Figure 40: Adding a new rule

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

When I receive a call from anyone in my business group

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

< Back Next > Finish Cancel

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

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

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

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

Figure 41: Adding a new rule

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

Choose which phones you would like to ring when you receive a call from anyone on your contact list

Seconds into call:	0	30	60	90	120	
My Phone		◀▶				🗑
(214) 555 1212	▶▶	◀▶				🗑

Phone Number: Start: End:

When Your Phone rings, use (You can only change the ringtone for Your Phone.)

If nobody picks up or all lines are busy, forward the call to

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

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

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

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

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

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

Figure 42: Incoming Call Manager – Rules tab

The screenshot shows a configuration window titled "When no rules apply in the 'Normal' set of rules". Below the title is the text "When no rules apply". There are seven radio button options for selecting an action:

- ☒ have my phone ring using the Standard Ringtone (dropdown menu)
- ☐ send the call to voicemail
- ☐ forward the call to <enter a number> (text input)
- ☐ inform the caller that I am not available and reject the call
- ☐ prompt the caller to record his or her name, then ring my phone and ask me whether I wish to accept the call
- ☐ try to reach me by having more than one phone ring, together or in sequence
- ☐ prompt the caller to record his or her name, then try to reach me by having more than one phone ring and ask me whether I wish to accept the call

At the bottom of the window are four buttons: "< Back", "Next >", "Finish", and "Cancel".

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

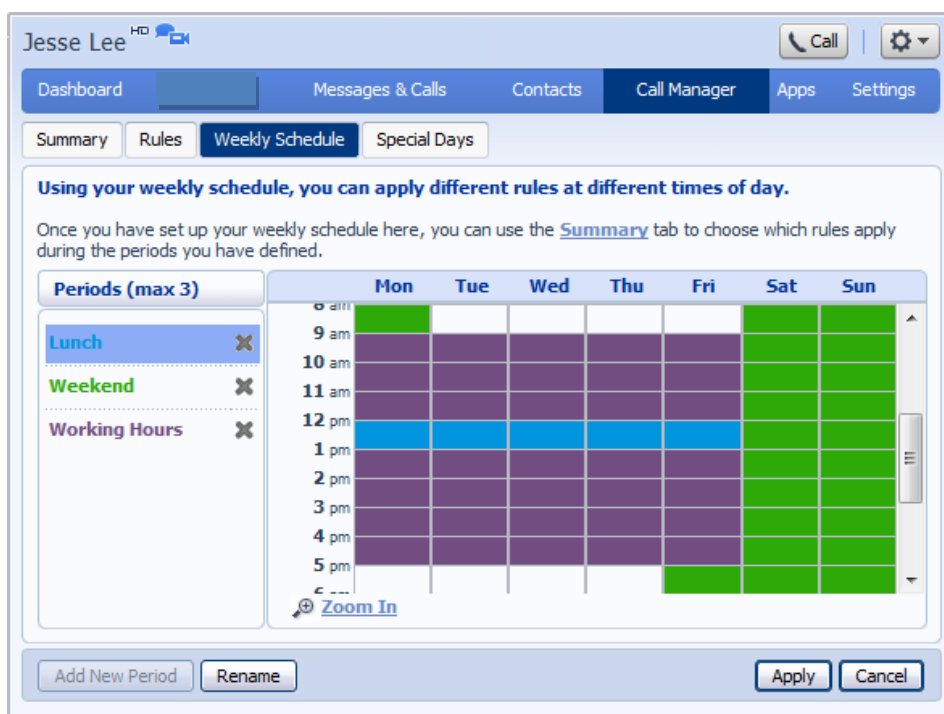
5.3 Schedule based routing

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

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

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

Figure 43: Incoming Call Manager – Weekly Schedule tab

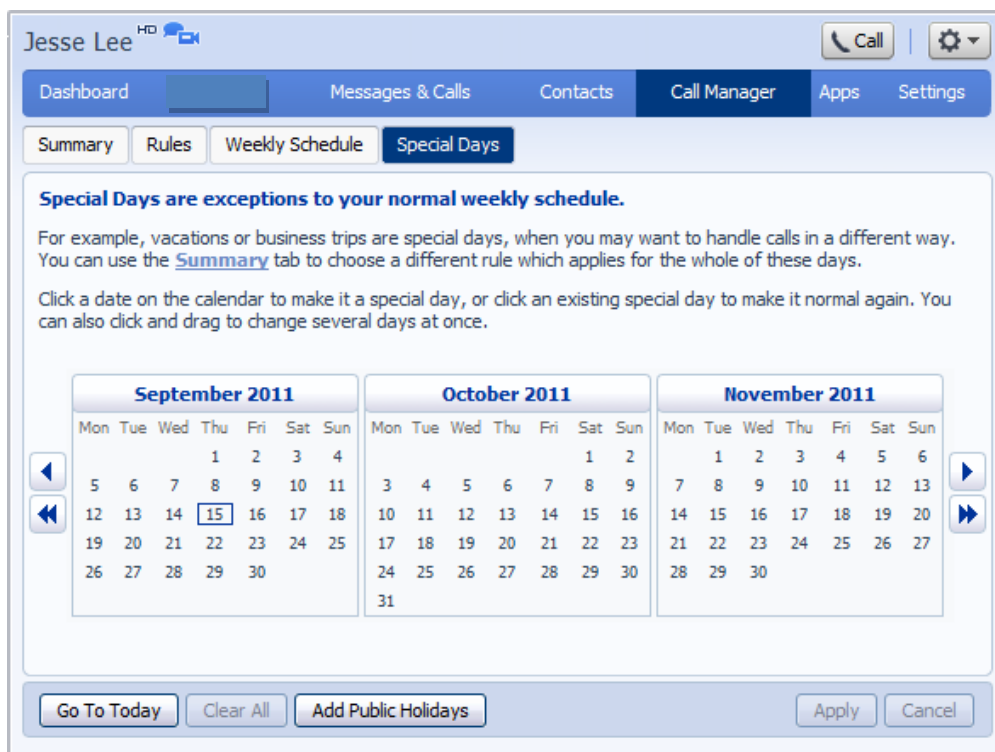


1. Select the period that you want to modify.
2. Using your mouse, point to the day and time you want to change and click the mouse. To change multiple time periods, left click and hold the mouse button and drag across the days and time periods you wish to change.
3. To rename a period, click the rename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



5.4 Special days (holidays)

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

Figure 44: Incoming Call Manager – Special Days tab



To select individual special days:

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

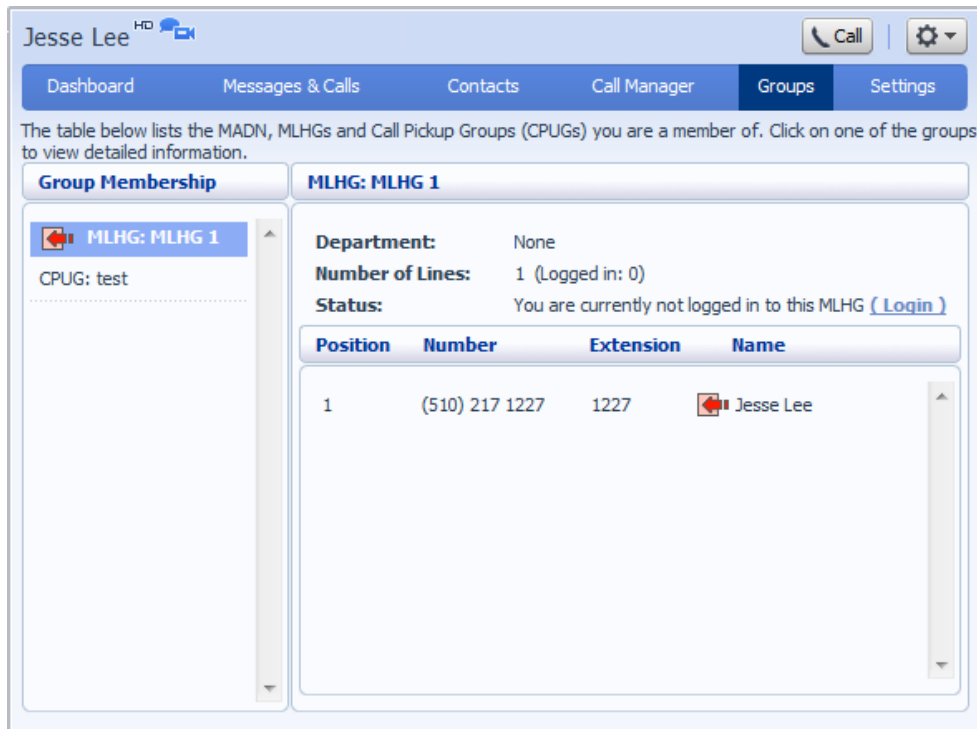
To have the system automatically define public holidays:

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

6 Groups

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

Figure 45: CommPortal Groups page



There are a number of different types of groups:

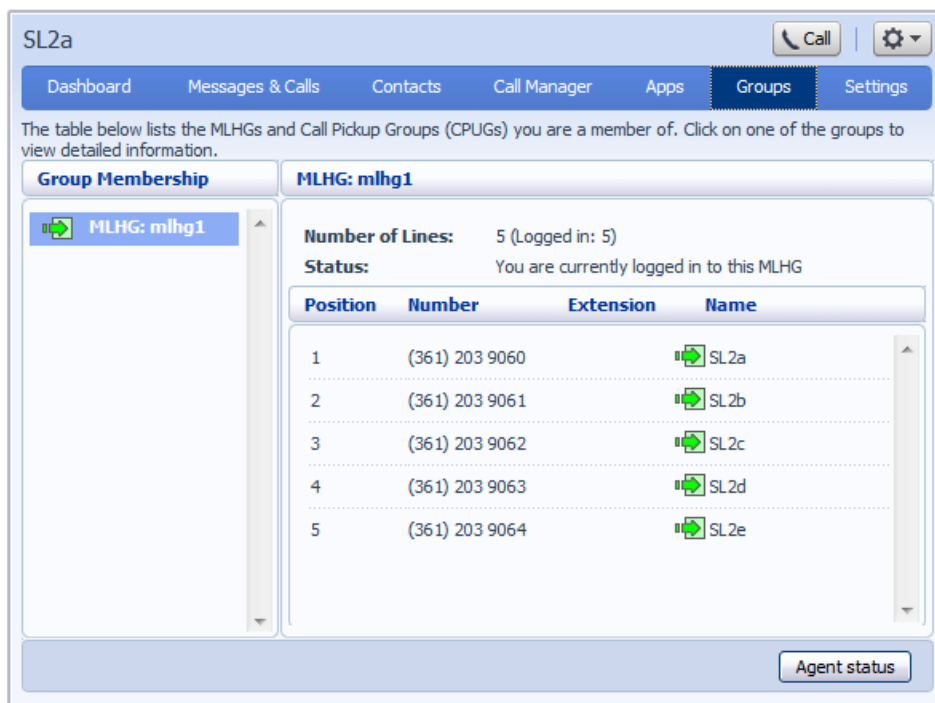
- **Multi Line Hunt Group.** When a call comes in to a Multi Line Hunt Group, each line in the group is rung in turn until someone answers the call. Depending on how your administrator has set up your Multi Line Hunt Group you may be able to log in and out of the Multi Line Hunt Group. When you're logged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

6.1 Multi Line Hunt Groups

6.1.1 Viewing Multi Line Hunt Groups

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

Figure 46: Groups – Multi Line Hunt Groups



The following information is shown:

- What department this Multi Line Hunt Group is in, if any. If your business does not use departments then this will say None.
- How many lines are in the group, and how many are logged in.
- Whether you are currently logged in.
- Details of each of the lines in this group and whether each line is currently logged in. Your line will be in this list.
- If you have the Call Queuing feature enabled, you will see an *Agent Status* button at the bottom right of the screen that you can click to access the Agent Status page described in 6.1.3.

6.1.2 Using Multi Line Hunt Groups

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

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

Using Your Phone

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

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

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

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

Using CommPortal

To log into the Multi Line Hunt Group using CommPortal click on *Login*.

Your line will be marked in the list with: 

To log into the Multi Line Hunt Group using CommPortal click on *Logout*.



Your line will be marked in the list with: 

6.1.3 Using the Agent Status screen

If you have the Call Queuing feature, you will be able to use the Agent status button at the bottom right of the Groups page to access the *Agent Status* screen.

Figure 47: Call Queuing Agent status screen

Agent Status				Logged in as: typ3
Incoming Call from: 3612032701				
	Waiting time	Callers waiting	Logged-in members	Queue Status
typ_mlhg1	0:55	1	3	Logged In

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

This screen

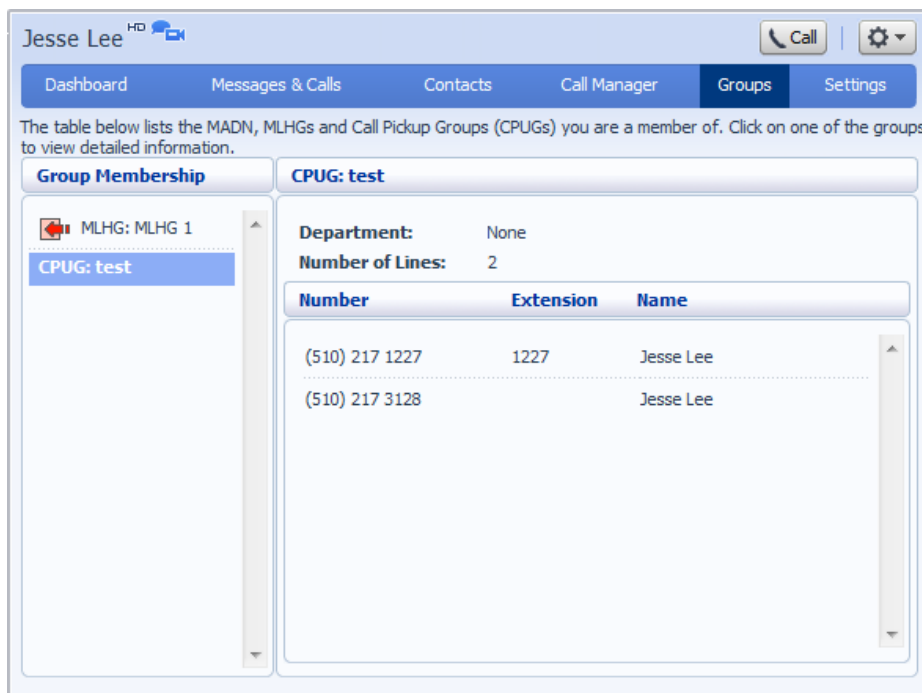
- shows statistical information on the MLHG(s) that you belong to
- displays caller information when you receive an incoming call, if you are able to see incoming call pop-ups
- enables you to use the gray icons to log in and out of MLHGs, if you are allowed to log out of your MLHG(s).

For more information on using Call Queuing, please see the *Call Queuing End User Guide*.

6.2 Call Pickup Groups

6.2.1 Viewing Call Pickup Groups

If your phone line is in a Call Pickup Group then there will be an entry in the *Group Membership* section called *CPUG:* Click on this entry to view that Call Pickup Group:

Figure 48: Groups – Call Pickup Groups

The following information is shown:

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

6.2.2 Using Call Pickup

To pick up for a call that is ringing on another phone in your Call Pickup Group, follow these steps:

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

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

1. Pick up your phone handset.
2. Dial the Directed Pickup access code: *312.
3. Dial the extension number on which the call is ringing.

6.3 Multiple Appearance Directory Numbers

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

Figure 49: Contacts: Multiple Appearance Directory Numbers

The screenshot shows the 'Groups' section of the CommPortal interface for user 'Jesse Lee'. The 'Group Membership' tab is selected, showing a list of groups on the left and detailed information for the selected group 'MADN: 5102173127' on the right. The detailed information includes the department (None), the number of lines (2), and a table of lines with their numbers, extensions, and names.

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

The following information is shown:

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

Only an administrator can make changes to a Multiple Appearance Directory Number group.

7 Settings

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

Figure 50: CommPortal Settings page

The screenshot shows the CommPortal Settings page for user (501) 203 0006. The page has a top navigation bar with tabs: Dashboard, Messages & Calls, Contacts, Call Manager, Apps, Groups, and Settings. Below this is a sub-navigation bar with tabs: Account, Calls, Messages, Account Codes, Notifications, Reminders, and Group Mailbox. The Account tab is selected. The main content area is divided into three sections: Personal Details, Security, and Devices. Each section has a list of settings and links to edit them.

Section	Setting	Value	Action
Personal Details	Name	Andy Randall	
	Department	Development	
	Admin	Sales	
	911 Location		set location
Security	Password		change
	Call Services PIN		change
	Voicemail PIN		change
Devices	Desk Phone	(501) 203 0006	set keys
	My Mobile	(123) 456 7890	edit
	Fax	(123) 456 9877	

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

7.1 Account

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

Figure 51: Settings - Account tab

(501) 203 0006 ▾ Call ⚙

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

Account Calls Messages Account Codes Notifications Reminders Group Mailbox

Personal Details [edit](#)

Name	Andy Randall
Department	Development
Admin	Sales
911 Location ?	set location

Security

Password	change
Call Services PIN	change
Voicemail PIN	change

Devices

Desk Phone	(501) 203 0006	set keys
My Mobile	(123) 456 7890	edit
Fax	(123) 456 9877	

The page is divided into the following panels.

Personal Details

The Personal Details panel shows you information about your line:

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

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

Security

The Security panel allows you to change your password, Call Services PIN or Voicemail PIN.

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

To change your CommPortal password, follow these steps:

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

You have two different PINs.

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

To change either of these PINs, follow these steps:

1. Click the *Change* link next to the PIN that you want to change.
2. Enter the new PIN in the *New PIN* text box.
3. Click on *Confirm*.

Devices

The Devices panel shows you the phones and other devices that you currently have configured for your account. If you have a SIP desk phone, you can use the Devices panel to configure settings for it by clicking on *set keys* next to its number. This will launch the Phone Configurator, which is described in Chapter 9.

7.2 Calls

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

Figure 52: Settings - Calls tab

The screenshot shows the 'Settings' tab in the 'Calls' section of the CommPortal interface. At the top, there is a header bar with a 'Call' button and a settings gear icon. Below this is a navigation bar with tabs: 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', 'Groups', and 'Settings'. Under the 'Settings' tab, there are sub-tabs: 'Account', 'Calls', 'Messages', 'Account Codes', 'Notifications', 'Reminders', and 'Group Mailbox'. The 'Calls' sub-tab is selected, showing a 'General' section with the following options:

- Auto-answer my phone for click-to-dial calls: ☐
- Call transfer number:
- Allow callers to send numeric pages: ☒
- Withhold caller ID when making calls: ☐
- If not withheld, signal my name as:
- Display caller name for incoming calls: ☐
- Display caller number for incoming calls: ☐

Below the 'General' section are two collapsed sections: 'Call Forwarding' and 'Call Blocking'. The 'Call Jump' section is expanded, showing the text 'Enter phone numbers you may want to transfer calls to.' and an 'Alternate' input field. At the bottom right of the settings panel are 'Apply' and 'Cancel' buttons.

- The General panel enables you to configure call settings, including caller ID options.
- The Call Forwarding panel lets you configure whether, when you dial the Call Forwarding access codes to enable Call Forwarding, you need to enter a phone number. If you don't want to enter a phone number then your Call Forwarding service will use the number you last configured through CommPortal.

To change whether you need to enter a number when enabling Call Forwarding from your handset, follow these steps:

- Check (to require a number to be entered) or uncheck (to mean a number is not required) the type of Call Forwarding you want to change.
- Click on *Apply*.

- The Call Blocking panel lets you configure what types of outgoing calls should be blocked from your line:

To block certain types of call, follow these steps:

- Check the type of call you want to block.
- Click *Apply*.

To unblock a type of call, follow these steps:

- Uncheck the type of call you want to allow.
- Click *Apply*.

The remaining panels on this page relate to particular call features. You will only see these panels if you have access to these services.

Call Jump

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

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

- The Alternate number will usually be an alternative landline number.
- The Wireless number will be a mobile device.

Call Me Buttons

The Call Me Buttons panel allows you to enable or disable your Call Me service and to cancel your existing buttons. If you disable the buttons by un-checking the *Enable Call Me Buttons* checkbox, potential callers who attempt to call you, for example by using a Call Me button that you had already included in an email, will see a message stating that the service is not currently available.

You can permanently disable all of your existing Call Me Buttons by clicking on *Cancel Existing Buttons*. If you want to reactivate the Call Me service in future, you will need to recreate and redistribute your Call Me buttons.

7.3 Messages

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

Figure 53: Settings - Messages tab

The screenshot displays the 'Settings - Messages' interface. At the top, there's a header with the phone number '(501) 203 0006' and a 'Call' button. Below the header is a navigation bar with tabs: 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', 'Settings', and 'Add Services'. Underneath, there's a sub-navigation bar with 'Account', 'Messages', 'Notifications', and 'Reminders'. The 'Messages' section is active, showing a 'General' section with the following settings:

- Incoming calls are forwarded to voicemail after seconds
- Transcribe voicemails in your inbox ☐
- Enable live screening ☐
- Enable video messaging ☒
- Forward messages and faxes as emails ☐
[add an email address](#)
- Leave original in Inbox ☐
- Include next action links in emails ☐

Below the 'General' section are two expandable sections: 'Mailbox Access' and 'Voicemail Greeting'. At the bottom right, there are 'Apply' and 'Cancel' buttons.

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

General

You can use the General panel to do the following.

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

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

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

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

Mailbox Access

You can use the Mailbox Access panel to:

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

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

Voicemail Greeting

You can use the Voicemail Greeting panel to:

- select your default greeting
- specify when alternative greetings should be used and the behavior when a greeting expires
- record or upload additional audio greetings, for example greetings to be used out-of-hours or during an extended absence
- override your default greeting with a temporary greeting for a defined period of time.

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

7.4 Account Codes

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

Figure 54: Settings - Account Codes tab

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

For more details on the account codes services, see section **Error! Reference source not found.** or speak to your administrator.

7.4.1 Account code options

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

Figure 55: Account Code Options

The screenshot shows a configuration window titled "Account Code Options". Inside, there is a section "Call types requiring an account code" with a list of call types and their corresponding checkboxes. The checked options are Regional, National, International, Premium Rate, Operator, Directory, and Carrier Dialed. The unchecked options are Local, Local Business Group, and Other Business Group. Below this list, there is a checkbox for "Use validated account codes" which is checked. There are two input fields: "Account code length" with the value "4" and "Max incorrect attempts before account is blocked" with the value "10". At the bottom right, there is a button labeled "Unblock Account Codes".

Call types requiring an account code	
<input type="checkbox"/> Local	<input checked="" type="checkbox"/> Operator
<input checked="" type="checkbox"/> Regional	<input checked="" type="checkbox"/> Directory
<input checked="" type="checkbox"/> National	<input checked="" type="checkbox"/> Carrier Dialed
<input checked="" type="checkbox"/> International	<input type="checkbox"/> Local Business Group
<input checked="" type="checkbox"/> Premium Rate	<input type="checkbox"/> Other Business Group

Use validated account codes ☒

Account code length:

Max incorrect attempts before account is blocked:

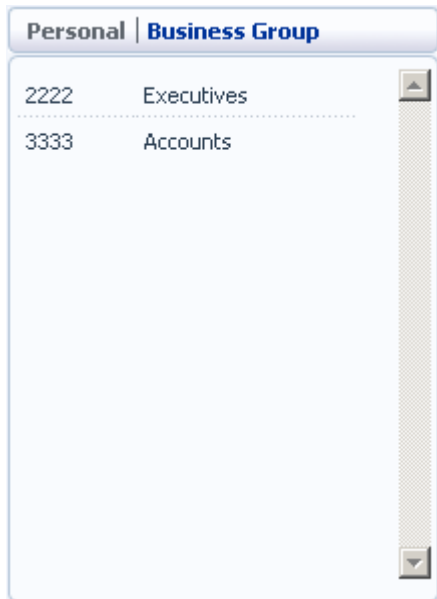
[Unblock Account Codes](#)

- Call types requiring an account code show you the types of calls which will require you to enter a code once you have dialed the number. In the example above, account codes are only required for International calls.
- Use validated account codes specifies whether your system uses validated or non-validated account codes.
- Account code length specifies the length of account codes you must enter.
- Max incorrect attempts before account is blocked specifies how many incorrect attempts to enter account codes are allowed in a row, before all calls requiring account codes are blocked.

7.4.2 Business account codes

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

Figure 56: Business account codes



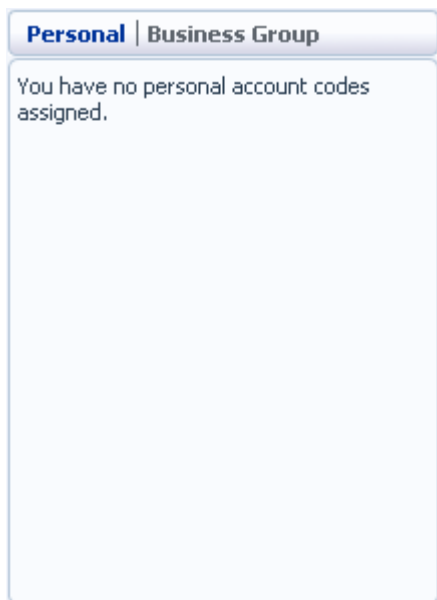
The screenshot shows a web interface with two tabs: 'Personal' and 'Business Group'. The 'Business Group' tab is selected. Below the tabs is a table with two columns. The first column contains account codes, and the second column contains their descriptions. There are two rows of data: '2222' for 'Executives' and '3333' for 'Accounts'. A vertical scrollbar is visible on the right side of the table.

Personal Business Group	
2222	Executives
3333	Accounts

7.4.3 Personal account codes

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

Figure 57: Personal account codes

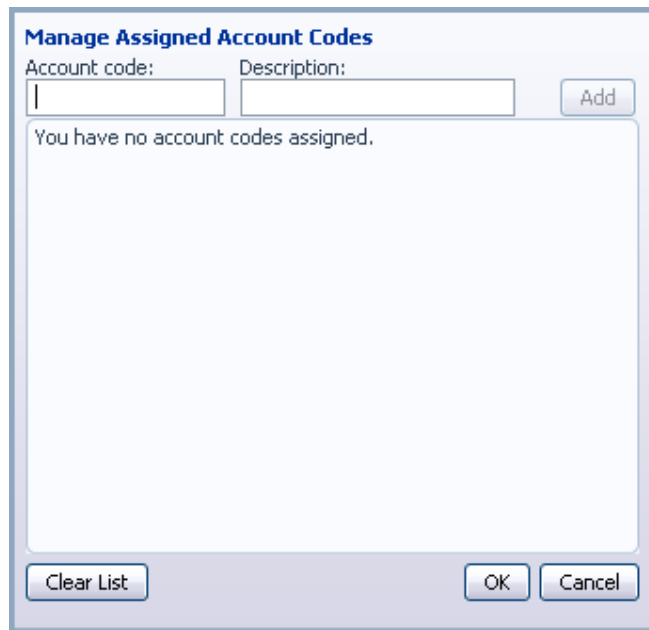


The screenshot shows a web interface with two tabs: 'Personal' and 'Business Group'. The 'Personal' tab is selected. Below the tabs is a message box that says 'You have no personal account codes assigned.'.

Personal Business Group	
You have no personal account codes assigned.	

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

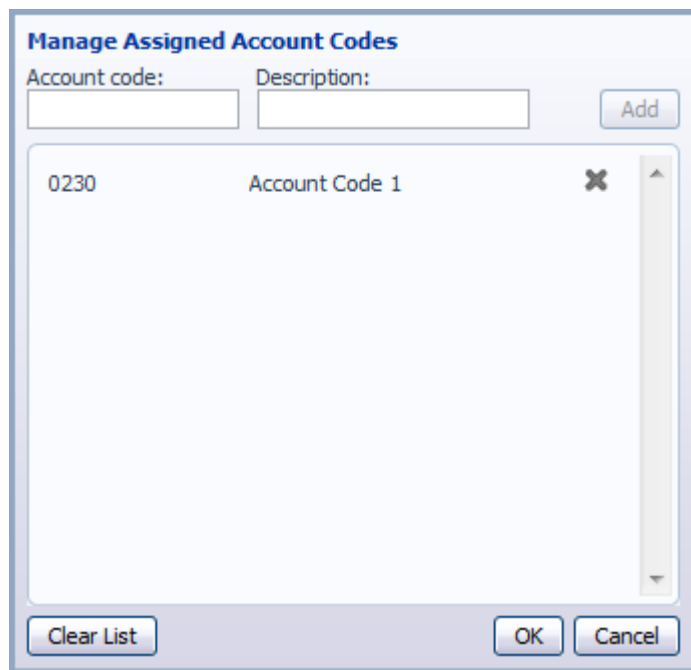
Figure 58: Editing personal account codes



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

To add an account code, follow these steps:

1. Enter an account code in the *Account Code* text box.
2. Enter a description for the code in the *Description* text box.
3. Click on *Add*.
4. Click on *OK*.
5. Click on *Apply*.

Figure 59: Adding an account code

The dialog box is titled "Manage Assigned Account Codes". It features two input fields at the top: "Account code:" and "Description:". To the right of these fields is an "Add" button. Below the input fields is a list area containing one entry: "0230" followed by "Account Code 1". To the right of this entry is a small "X" icon for deletion. At the bottom of the dialog are three buttons: "Clear List", "OK", and "Cancel".

To delete an account code, follow these steps:

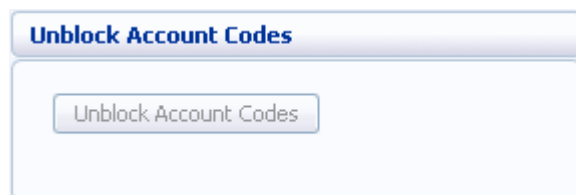
1. Click on the Cross icon to the right of the account code: ✕
2. Click on *OK*.
3. Click on *Apply*.

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

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

7.4.4 Unblocking account codes

If your phone line is configured to use account codes, and an incorrect account code is entered too many times when making calls, your service will be blocked. To unblock this service, click on *Unblock Account Codes*.

Figure 60: Unblock Account Codes

The image shows a button labeled "Unblock Account Codes". The button is rectangular with a light blue gradient and a thin border.

For more details on Account Codes, see Section **Error! Reference source not found.** or speak to your administrator.

7.5 Notifications

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

Figure 61: Settings - Notifications tab

(501) 203 0006 ▾ Call Settings

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

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

[MWI](#) | [Email](#) | [Pager](#) | [Outdial](#) | [Override](#)

☒ Send phone notification of incoming messages to the following phone numbers

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

Clear List New Entry Apply Cancel

MWI tab

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

Figure 62: Messaging Settings – MWI Tab

(501) 203 0006 ▾ Call Settings

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

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

MWI | Email | Pager | Outdial | Override

☒ Send phone notification of incoming messages to the following phone numbers

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

Clear List New Entry Apply Cancel

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

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

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

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

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

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

Email tab

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

Figure 63: Notification settings - Email tab

The screenshot shows the 'Notification settings - Email tab' for user Stephen Edwards. The interface includes a top navigation bar with 'Call' and 'Settings' icons, and a main menu with 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', 'Groups', and 'Settings'. Below this is a sub-menu with 'Account', 'Calls', 'Messages', 'Account Codes', 'Notifications' (selected), and 'Reminders'. The 'Email' sub-tab is active, showing a checkbox for 'Send email notification of incoming messages to the following addresses' which is checked. Below this is a table with columns: 'Email Address', 'All Faxes', 'Urgent Voicemail', and 'All Voicemail'. The table contains one entry: 'stephen.edwards@corporation.com' with checkboxes for 'All Faxes', 'Urgent Voicemail', and 'All Voicemail'. A 'Clear List' button is at the bottom left, and 'Apply' and 'Cancel' buttons are at the bottom right.

Email Address	All Faxes	Urgent Voicemail	All Voicemail
stephen.edwards@corporation.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To add an email address to be notified, follow these steps:

1. Click on *New Entry*.
2. Enter the email address.
3. Click on *Add*.
4. Check whether you want *All Faxes*, *Urgent Voicemail*, or *All Voicemail* sent to this address.
5. Click on *Apply*.

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

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

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

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

Pager tab

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

Figure 64: Pager Notifications

Joanna Price

Call | Settings

Dashboard | Messages & Calls | Contacts | Call Manager | Apps | Groups | Settings

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

MWI | Email | **Pager** | Outdial | Override

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

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

New Entry | Apply | Cancel

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

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

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

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

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

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

Outdial tab

The outdial tab allows you to configure a telephone number that will be called whenever a new message arrives in your account.

Figure 65: Outdial Notifications

The screenshot shows the 'Outdial' configuration window. At the top, there's a header bar with a phone number '(501) 203 0006' and a 'Call' button. Below this is a navigation bar with tabs: Dashboard, Messages & Calls, Contacts, Call Manager, Apps, Groups, and Settings. Under 'Settings', there are sub-tabs: Account, Calls, Messages, Account Codes, Notifications (selected), Reminders, and Group Mailbox. Below these are links for MWI, Email, Pager, Outdial (selected), and Override. The main content area has a checked checkbox for 'Send outdial notification of incoming messages, according to the schedule:'. Below this, there's a text field for 'Specify the phone number to send outdial notifications to:' with the value '(689) 563 2587'. Then, a section 'Choose the incoming messages that should be notified to the specified phone number:' contains three checkboxes: 'Urgent Voicemail' (checked), 'All Voicemail' (unchecked), and 'All Faxes' (checked). Below that, a section 'Set the delay between receiving the message and receiving the notification for the message:' has two dropdown menus: 'Delay for normal messages:' set to '4 hours' and 'Delay for urgent messages:' set to '8 hours'. The next section 'Set a retry limit and delay between retry attempts until the message is marked as read:' has a text field for 'Number of outdial retry attempts:' set to '3' and a radio button selected for 'Stop retries when you answer the call'. Below that, another text field for 'Delay between retries (minutes):' is set to '10' with a radio button for 'Stop retries only when you access your voicemail'. At the bottom right are 'Apply' and 'Cancel' buttons.

Using this tab, you can:

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

You can also

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

Override tab

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

Figure 66: Notification settings - Override tab

The screenshot shows the 'Override' tab in the 'Notifications' section of the CommPortal user interface. The user is Stephen Edwards. The interface includes a top navigation bar with 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', 'Groups', and 'Settings'. Below this is a sub-navigation bar with 'Account', 'Messages', 'Account Codes', 'Notifications', and 'Reminders'. The 'Notifications' section has three tabs: 'MWI', 'Outdial', and 'Override'. The 'Override' tab is active, showing a checkbox for 'Override your outdial and pager notifications, sending them according to the schedule:' which is checked. Below this, there is a section for 'While the override profile is active, notify me by: Outdial' with an 'Expiry date' set to 12/27/2012. A text field specifies the phone number to send outdial notifications to as 1129000005. There are two radio buttons for 'Choose the incoming messages that should be notified to the specified phone number:': 'Urgent Voicemail' (selected) and 'All Voicemail'. Below this, there is a section for 'Set a retry limit and delay between retry attempts until the message is marked as read:'. It includes a 'Number of outdial retry attempts' set to 3 and a 'Delay between retries (minutes)' set to 15. There are two radio buttons for this section: 'Stop retries when you answer the call' (selected) and 'Stop retries only when you access your voicemail'. At the bottom right, there are 'Apply' and 'Cancel' buttons.

Using the Override tab, you can

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

You can also

- configure a schedule containing periods when outdial notifications are sent – during inactive periods (for example overnight) any unheard message will still activate the MWI, but the outdial notification is postponed until the next active period in the schedule.
- control the delay between receiving a message and sending out a notification
- control how many times, and at what interval, the system will retry a call if the notification is not acknowledged

- control what you have to do to acknowledge the notification: simply answer the outdial call, or proceed to access their voicemail. The second option prevents a notification being lost because the call was picked up by an answering machine or by someone else.

7.6 Reminders

The Reminders tab lets you set up reminder calls.

Figure 67: CommPortal Reminders page

(510) 217 5185 HD Call Settings

Dashboard Messages & Calls Contacts Call Manager Apps Groups Settings

Account Calls Messages Notifications Reminders

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

You have no reminders.

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

Occurs: Select

Time: 9 30

Hour Min

Add

Clear List Apply Cancel

7.6.1 Adding reminders

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

Figure 68: New Reminder section

New Reminder

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

Occurs: Select

Time: 9 30 am

Hour Min am/pm

Add

To add a new reminder, follow these steps:

Figure 69: Adding a new reminder



New Reminder

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

Occurs: Select

Time: Once only (next 24 hours)

Select

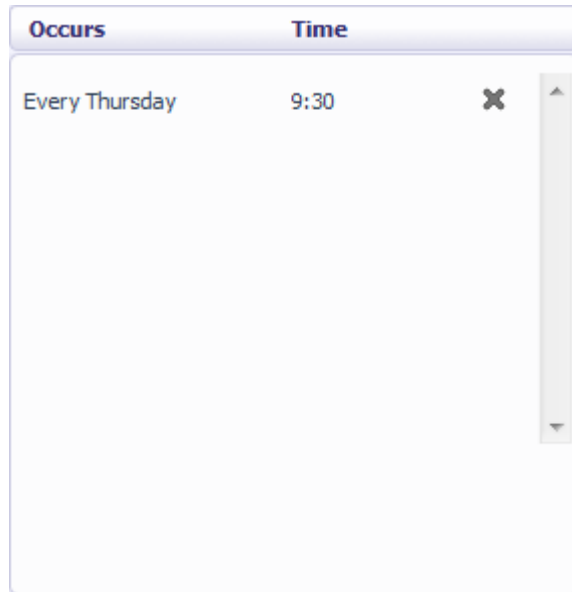
- Once only (next 24 hours)
- Every Monday
- Every Tuesday
- Every Wednesday
- Every Thursday
- Every Friday
- Every Saturday
- Every Sunday
- Every weekday
- Every day

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


7.6.2 Deleting reminders

To delete a reminder, you use the Reminders list:

Figure 70: Deleting a reminder



To delete a reminder, follow these steps:

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

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

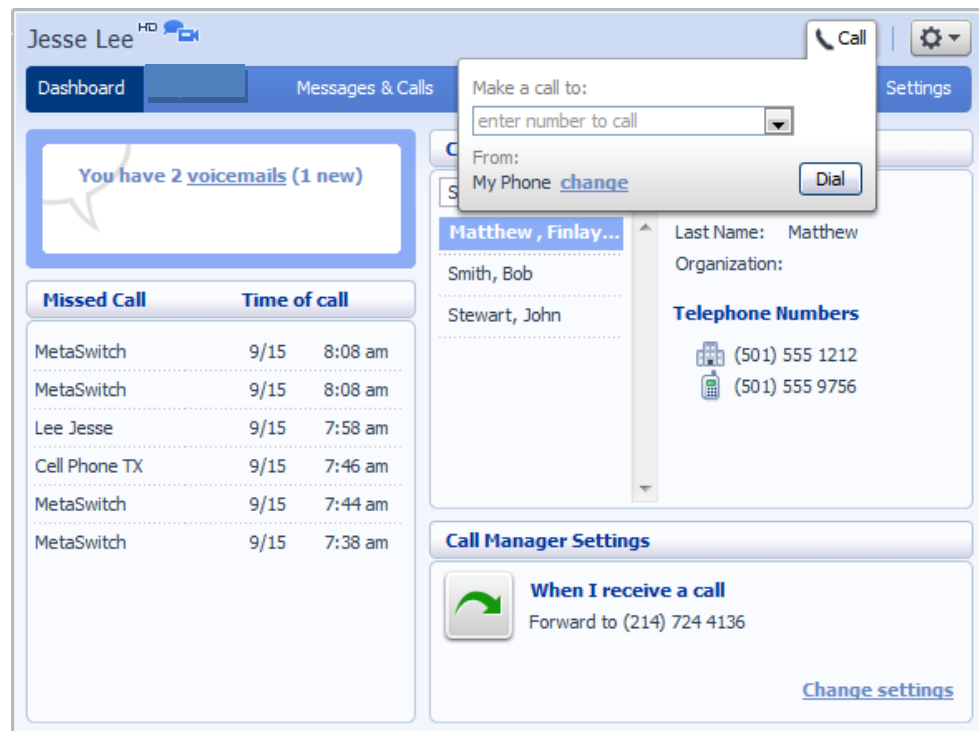
1. Click on *Clear List*.
2. Click on *Apply*.

8 Click To Dial

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

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

Figure 71: Click To Dial Window

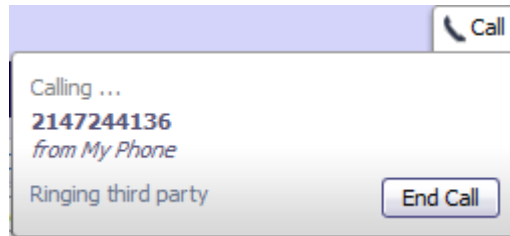


8.1 Calling from your regular phone

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

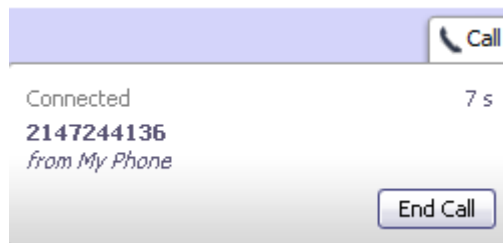
When you answer it the number you entered will be called.

Figure 72: Click To Dial – Call in Progress



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

Figure 73: Click To Dial – Call Connected



9 Configuring your phone's keys

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

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

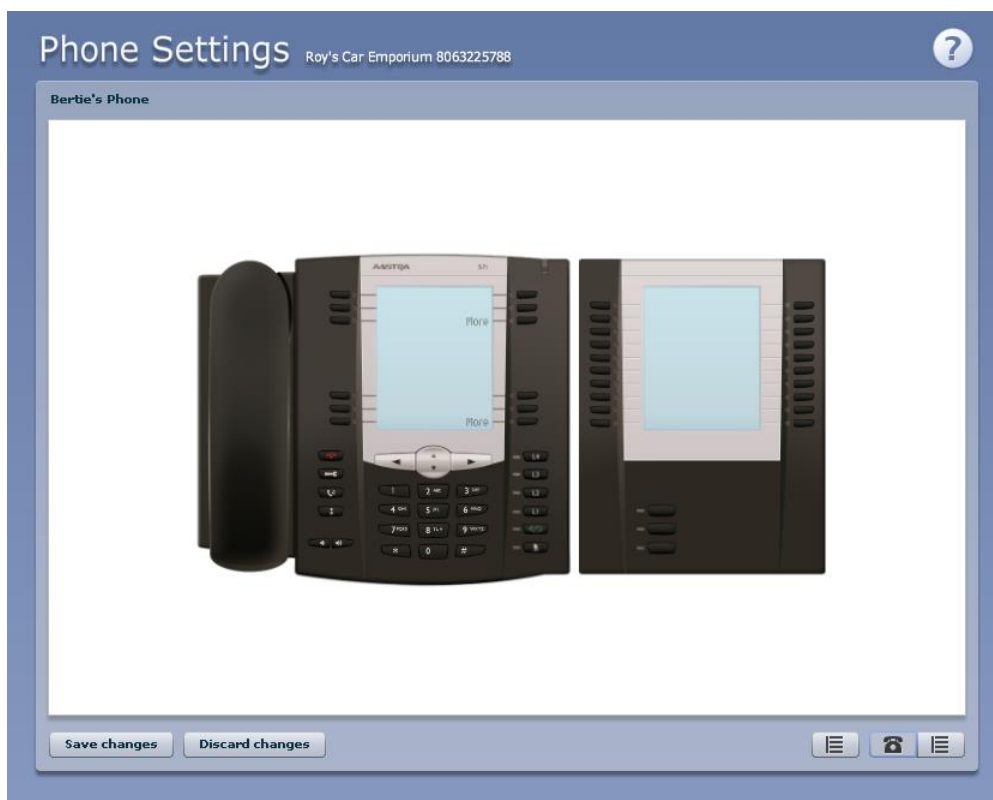
This launches a new browser window for the Phone Configurator.

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

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

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

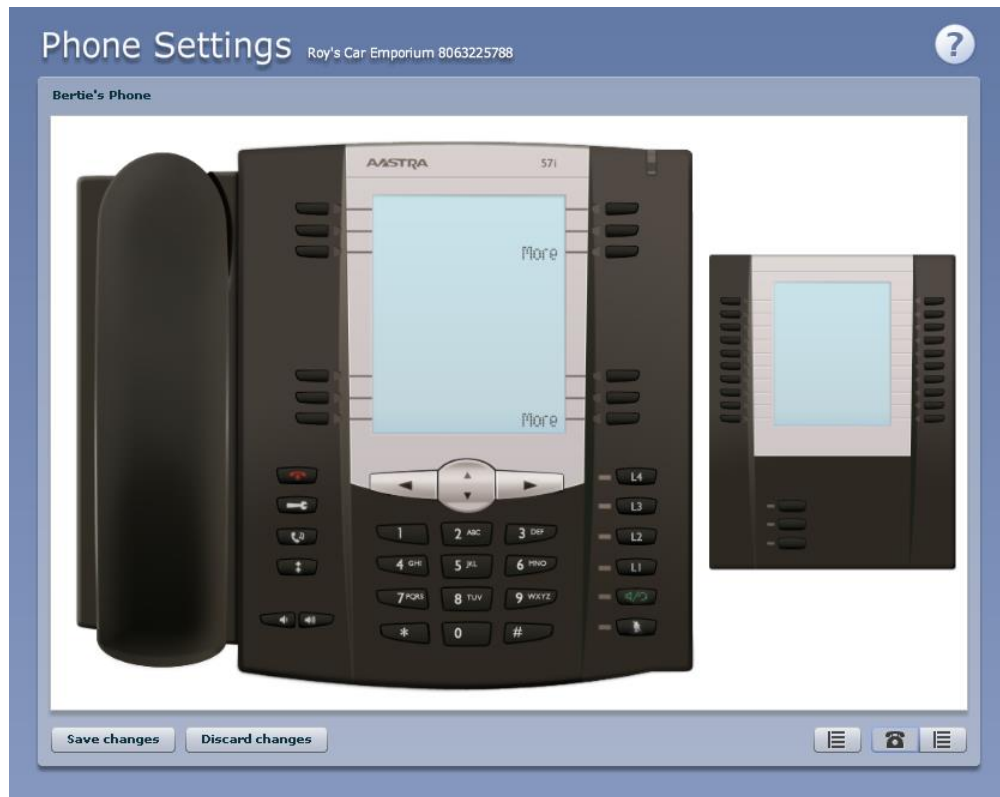
Figure 74: Phone Configurator graphical view



The examples shown in this document show an Aastra 57i phone with a 560M sidecar. Your phone model may differ from the one shown.

If you have a phone with one or more sidecars, you can zoom in on the phone, or a sidecar, by hovering your mouse pointer over it:

Figure 75: Phone Configurator – Phone and Sidecar view



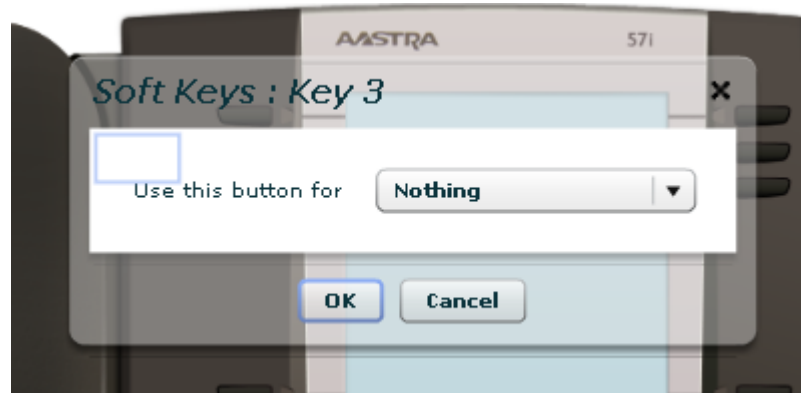
You can see whether you can modify a key by hovering your mouse over the key. If the key glows blue you can configure it. If it glows red, you cannot.

Figure 76: Configurable key



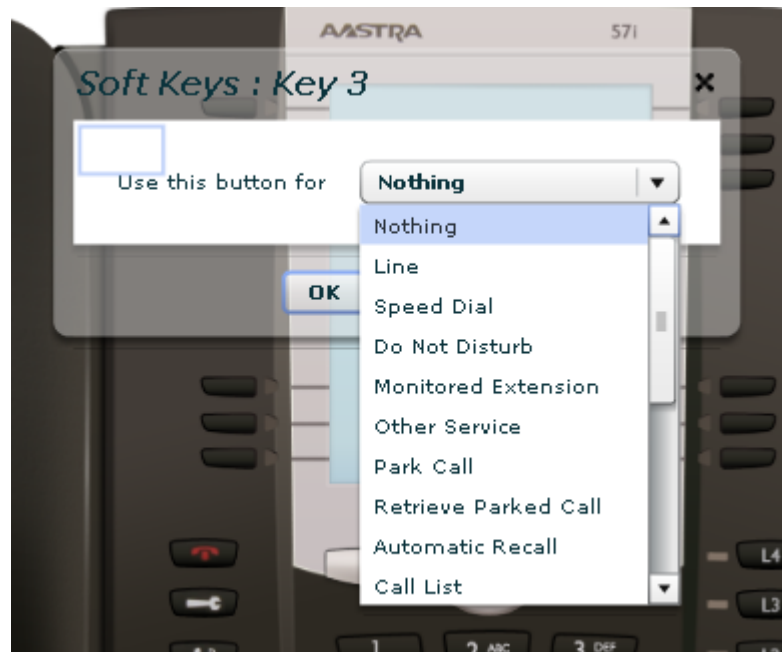
To select a key, click on it. This will launch a pop-up allowing you to configure the key:

Figure 77: Configuring a key



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

Figure 78: Configuring a key



The possible options are as follows (although not all of these options may be enabled on your phone system):

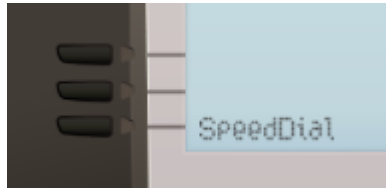
- Nothing – this is used when a key is not assigned a function.
- Line – this key is used for your phone line. Pressing this key will cause the phone to go off-hook and ask you for digits to dial. When calls come into that phone line, this key can be used to answer those calls.
- Speed Dial – this configures the key as a speed dial.
 - Enter the number you want this Speed Dial to call in the box provided.

- Do Not Disturb – configures the key as a Do Not Disturb key
- Monitored Extension – allows you to monitor another line
 - Enter the number of the extension you want to monitor in the box provided.
- Other Service – this is reserved for future services.
- Park Call – this is used to park calls
- Retrieve Parked Call – this is used to retrieve parked calls
- Automatic Recall – this sets up the key as a speed dial to call the Automatic Recall access code.
- Call List – this configured the key to show you recent calls.
- Directory – this configures the key to provide you with the phone's list of contacts.
- Intercom – this configures the key to launch a paging call
- Services – this configures the key to provide to access to services configured on your phone.
- Voicemail – this configures the key as a speed dial to access your Voicemail.
- Last Caller ID Erasure – this configures the key as a speed dial to call the access code which clears the network list of your recent calls.
- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.
- Trace Call – this configures the key as a speed dial to call the Call Trace service.
- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.
- Group Pickup – this configures the key as a speed dial for the Group Pickup service, described in Section 6.2.2.
- Directed Pickup – this configures the key as a speed dial to pickup calls ringing on a particular line.
 - Enter the number of the extension you want to pick up calls for in the box provided.

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

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

Figure 79: Configured key with label



Once you have finished configuring your keys, click on *Save changes* to save your changes. Your phone will pick up the changes you have made overnight. If you want the phone to apply the changes immediately, reboot it, by unplugging it and plugging it back in.

9.1.1 Pages of keys (built-in phones)


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

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

Figure 80: Page of Keys



9.2 Table view (built-in phones)

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