



TruConnect Hosted PBX User Guide



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1-800-768-1212

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TruConnect

QUICK REFERENCE GUIDE

TRUVISTA®



Polycom

Keys	Key Description
	Directories key – Access to local directories and call lists
	Services key – Access to special services. Contact your administrator.
	Conference key – Establishes a 3-way conference call.
	Transfer key – Transfer of current call to third party.
	Redial key – Redial the most recently dialed number.
	Voicemail key – Retrieves messages from the voice mailbox.
	Menu key – Access local (your phone) and global (your organization) features.
	Do Not Disturb key – Switches Do Not Disturb mode on and off.
	Hold key – Places a call on “Hold” or resumes it.
	Speakerphone key – Allows for hands-free communication during calls.
	Microphone Mute key – Mutes audio transmission locally during calls.
	Headset key – Allows you to place and receive calls through an optionally connected headset.
Display Control Keys – Use and (arrow keys) to scroll through the displayed information. Use to select a field of displayed data. Use to delete displayed data.	
	Volume Keys – Use these to adjust the volume of the handset, headset, speaker, and ringer.

Basic Phone Features

Make a Call

1. Lift the Handset and dial the phone number.
2. Depending on your phone and configuration, you may need to hit the **Dial** soft key.

Answering a Call

To answer a call using the speakerphone, press the **Speaker** key or **Answer** key.

Redial

Press the **Redial** key to call a recently dialed number

Ending Calls

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

Programmable Function Keys

Up to 6 programmable keys on the PolyCom phones. Use these keys to activate up to six lines or speed dials that can be assigned to your phone.

Soft Keys

The screen will display labels for these keys, to identify their context-sensitive functions.

For Your Reference

Your phone number	
Your extension	
Code to dial an external number	
Access your phone settings online	
Conferencing phone number	
Conferencing moderator code	
Conferencing participant code	
Conferencing moderator web access	
Remote access to call forwarding number	
Remote access to call forwarding PIN	
Your administrator	
You administrator's phone number	

Advanced Call Handling

Call Hold

1. To put a call on hold, press the **Hold** key
2. To retrieve the call, press the **Resume** key or press the **Hold** key again

Call Transfer

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

Call Waiting

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

To answer the second call, select **OK** press the line key which is flashing.

3 Way Conferencing

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

Parking a Call

Parking a call places the call on hold in a “park orbit” so that the call can be retrieved from another phone.

1. Initiate call transfer by pressing the **Transfer** key.
2. Dial the Call Park access code ***53**.
3. Listen to the park orbit number where the call will be parked.
4. Complete the call transfer by pressing **Transfer** again. To retrieve a parked call, dial ***54** followed by the park orbit number.

Do Not Disturb

Do Not Disturb enables you to send call straight to voicemail.

1. If you have a key marked **Do Not Disturb**, press this to turn Do Not Disturb On and off.
2. If you don't have a Do Not Disturb key then dial ***78** to turn Do Not Disturb and ***79** to turn it off.

Voicemail

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

- To access voicemail: Press ***318** or press the Messages or Voicemail key if you have one.
- To listen to your voice messages: Press 1
- To listen to your other messages: Press 11
- To save a message: Press 2
- To delete a message: Press 3
- To change your mailbox settings: Press 4
- To go back to previous menu: Press *
- To finish: Press #

You may also access your voicemail visually using **CommPortal**

Call Forwarding

Your phone system supports different types of Call Forwarding: Immediate, Busy, and No Answer.

To enable and disable call forwarding, go to the Call Manager tab in **CommPortal**.

To enable call forwarding using the phone, dial the access code for the type of call forwarding you want to enable followed by the number you wish to forward calls to.

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

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CommPortal

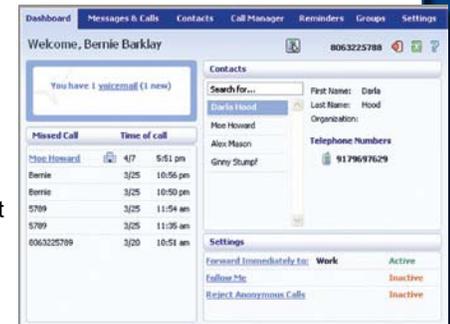
CommPortal gives you a powerful and easy to use Web interface to your phone settings.

Logging In:

1. Go to:
<https://commportal.truvista.net>
2. Enter your phone number
3. Enter your password

Dashboard Page

The dashboard displays new voice messages, recent received and missed calls, contacts, and settings you have applied to your phone.



Messages & Calls

- The **Messages** tab displays new and saved voice messages. Play, delete, or mark as heard/unheard.
- **Missed Calls**, **Dialed Calls**, and **Received Calls** show you all your recent called activity.

Call Manager

- The Summary tab of **Call Manager** provides a description of what will happen to your incoming calls.
- The other tabs allow you to change the settings of your call coverage, including Call Forwarding, Do Not Disturb, and FindMe/FollowMe.

Change Password

1. Go to **Settings** page
2. Enter your new password in **Password** box
3. Re-enter your new password in the **Confirm Password** box
4. Click **Change Password**

Configure Your Phone Keys

1. Select the **Settings** page in CommPortal.
2. Select the **Phones** tab.
3. Click on the **Configure Your Phone** link.

Common Access Codes

Park Call	*53
Retrieve Parked Call	*54
Do Not Disturb Activation	*78
Do Not Disturb Deactivation	*79
Automatic Recall	*69
Group Call Pickup	*311
Voicemail	*318



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1 Introduction

Welcome to your new phone!

This document describes the features of your phone, including the web management tool, CommPortal. (<https://commportal.truvista.net>)

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

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

2 Making Calls

2.1 Internally

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

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

2.2 Externally

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

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

2.3 Emergency Calls

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

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

2.4 Speaker Phone

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

2.5 Ending Calls

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

3 Answering Calls

3.1 Using the Handset

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

3.2 Using the Speaker

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

4 Call Forwarding

4.1 Introduction

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

- **Immediate** (sometimes called **Unconditional**) **Call Forwarding** is where all calls are forwarded to a number of your choice. This can either be to your voicemail (which is the default) another extension in your business or an external number.
- **Busy Call Forwarding** forwards all calls that are received when you are already on the phone.
- **No Answer** (sometimes called **Delay**) **Call Forwarding** forwards all calls when you do not answer them after a certain delay.
- **Selective Call Forwarding** forwards calls from certain numbers to another number.

The easiest and most flexible way of configuring call forwarding is using CommPortal. See Section **Error! Reference source not found.** for instructions on doing this. This section provides instructions on how to set up Call Forwarding using your handset.

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

4.2.1 Enabling

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

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

4.2.2 Disabling

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

4.2.3 Access Codes

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

4.3 Selective Call Forwarding using the Handset

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

4.4 Remote Access to Call Forwarding

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

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

5 Advanced Call Handling

5.1 Putting a call on hold

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

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

5.2 Call Waiting

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

To answer this second call you should either select the **OK** or **Confirm** key (snom phones) or the **Answer** key (Aastra or Polycom phones), or press the line key which is flashing. Answering the second call will automatically put the first call on hold. You can toggle between the calls by placing the current one on hold and retrieving the other call.

5.3 Transferring a call

To transfer a call, follow these steps:

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

5.4 Three Way Conferencing

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

1. When in a regular call, press the **Conf** key (snom phones) or the **Conference** key (Aastra or Polycom phones).
2. Dial the person you want to join your call.
3. Once this person has answered press the **Conf** or **Conference** key again to set up the three way call.

5.5 Parking a call

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

1. If you have keys on your phone for parking calls, when in a call press the key of the park orbit where you want the call parked. The call will now be parked and you may now replace the handset.
2. If your phone doesn't have dedicated call park keys, follow these steps:
 - Initiate call transfer by pressing the **Transfer** key (snom or Polycom phones) or the **Xfer** key (Aastra phones).
 - Dial the Call Park access code ***53**.
 - Listen to the park orbit number where the call will be parked.
 - Complete the call transfer by pressing **Transfer** or **Xfer** again.

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

5.6 Retrieving a parked call

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

1. If you have keys on your phone for parked calls, pick up the handset and press the key of the park orbit where the call is parked.

2. If you don't have dedicated call park keys lift the handset and dial the Call Retrieve access code ***54** followed by the park orbit number.
 - For example, to retrieve a call parked on orbit 1, you should dial ***541**.

5.7 Do Not Disturb

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

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

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

6 Voicemail

6.1 Accessing Voicemail

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

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

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

6.2 Using the Voicemail system

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

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

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

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

7 Conferencing

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

7.1 Moderator Instructions

Give all the conference participants:

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

To start the conference call, follow these steps:

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

The conference call will now be set up.

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

7.2 Participant Instructions

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

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

The participant will then be placed into the conference if the moderator has started it, otherwise they will be put on hold until the conference starts. (They may hear on-hold music while they are waiting.) If configured the conference may start as soon as there are 2 participants, whether or not the moderator is one of them.

7.3 Moderator Commands

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

- 1** Allows you to dial another participant to be brought into the conference. After dialing **1** dial the participant's number followed by **#**.
Once the participant has answered you can press **1** to bring them into the conference, or press ***** to drop the call and return to the conference.
- 2** Mute or un-mute the moderator.
- 3** Lock or unlock the conference. When locked no-one else can join the conference.
- 4** Provide a roll-call of participants.
- 5** Provide a count of participants.
- 6** Selects whether announcements should be made when participants join and leave.
- 7** Announces the name of the last person to join the conference.
- 8** Turns conference call recording on or off.
- 9** Mute or un-mute all participants.
- 01** Record a greeting to be played to participants when they join the conference.
 - You will hear an announcement giving instructions for recording the secondary greeting.
 - Press **2** to start recording. Record the greeting and then press **#**.
 - Press **1** to hear the recording you have just made.
 - When you are happy with the new greeting, press **3** to save it.
- *** This command allows the moderator to leave the conference without the call ending. Press **1** to confirm. You may log onto the conference again by following the instructions to start a conference call.

7.4 Moderator Web Access

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

1. Point a browser at the web conferencing address <https://conf.sp.net/conf>.
2. Enter your moderator and participant code.

3. Select *Submit*.

8 Other Phone Features

8.1 Speed Dials

Your phone system supports three different sorts of speed dials.

1. Depending on your phone model, keys on your phone can be configured to automatically call certain destinations. To configure these keys for speed dials, see Section 19.
2. Another sort of speed dial is where you dial a short number (1 or 2 digits), which is configured to call a regular extension or phone number. To configure these speed dials, see Section 12.2.
3. Your phone system also supports Short Codes. These are short (usually 3, 4 or 5 digit) numbers which are speed dials that can be used and are the same on any phone in your business. They are set up by your administrator and you can view them in CommPortal. See Section 12.4 for how to do this.

8.2 Monitoring Other Lines

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

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

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

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

8.3 Paging

This function is not available on Polycom phones.

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

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

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

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

NOTE: This function is not currently supported on Polycom phones

8.4 Account Codes

If you have account codes configured on your line then once you have dialed a number which requires a code, you will hear a tone. You will then need to dial a special code before the call is connected.

Your system may use either validated or non-validated account codes. If your system uses validated account codes then you must enter a specific code that has been configured either by your administrator or by you. If your system uses non-validated account codes you can enter any code so long as it is the right length.

If you have account codes your administrator should have explained this to you and told you what codes to use. For more on account codes see Section 17.2

8.5 Headset

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

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

8.6 Further Information

If you want a more detailed description of the operation of your model of phone, please refer to the manufacturer's instructions. These can be found on their website:

<http://www.snom.com/>, <http://www.aastratelecom.com/> or <http://www.polycom.com/>.

9 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.

9.1 Accessing

To access CommPortal point a browser at <https://commportal.truvista.net>

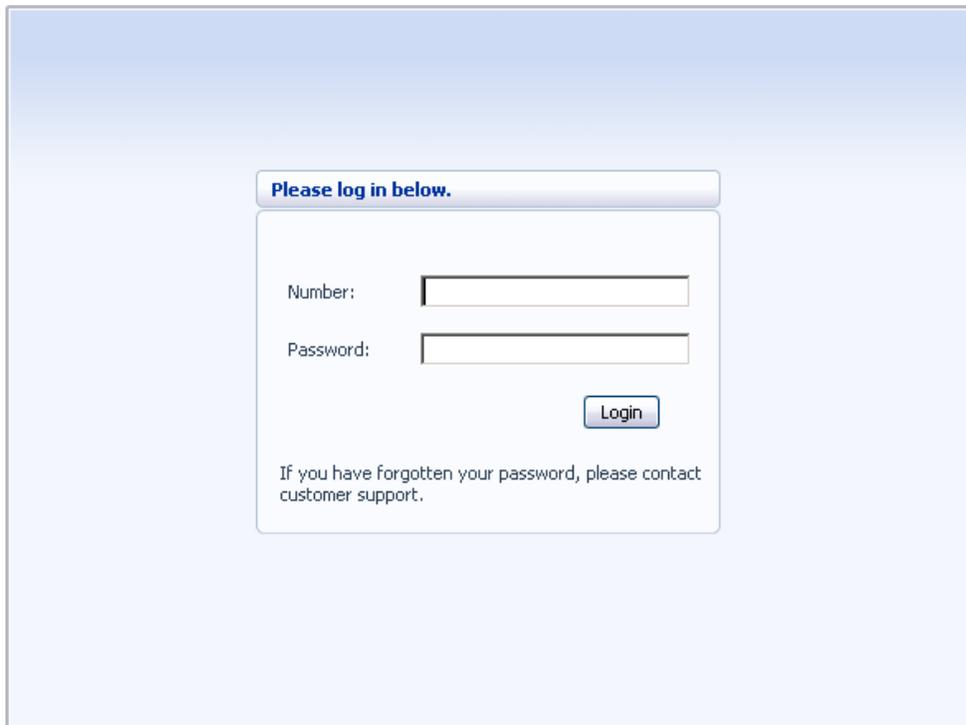
CommPortal is supported on Windows 2000, Windows XP, Windows 2003 and Windows Vista, using the following browser versions:

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

JavaScript must be enabled on your browser.

9.2 Logging In

The following shows a sample CommPortal login page.

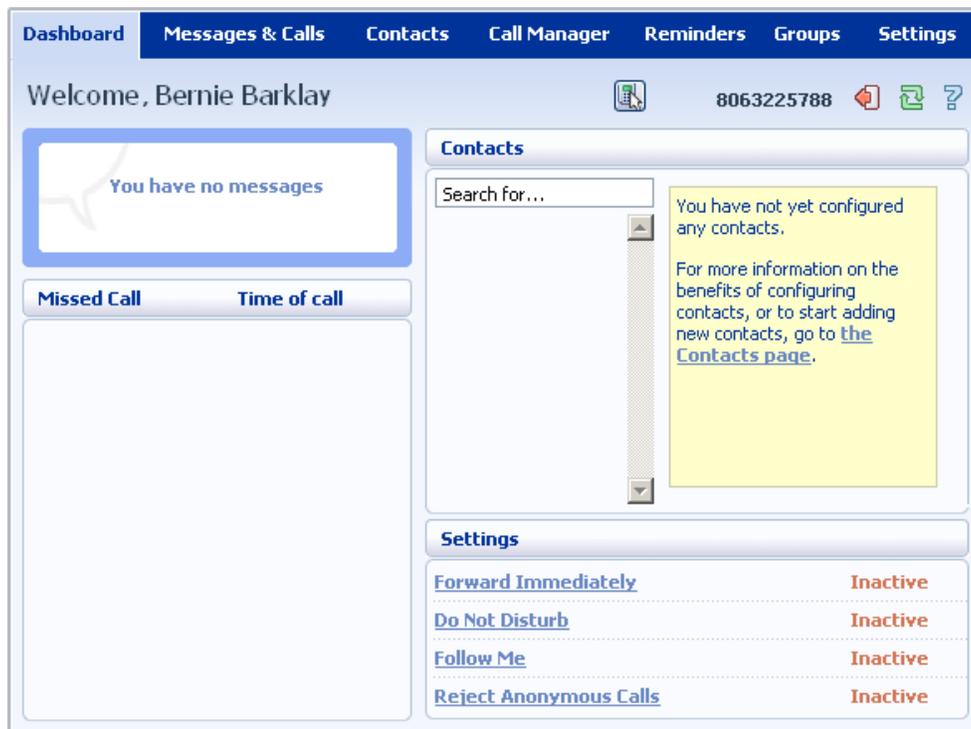


The screenshot shows a login interface with a light blue gradient background. At the top, a rounded rectangle contains the text "Please log in below." Below this, there are two input fields: "Number:" followed by a text box, and "Password:" followed by a text box. A "Login" button is positioned below the password field. At the bottom of the form area, there is a line of text: "If you have forgotten your password, please contact customer support."

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

9.3 Using CommPortal

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



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

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

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

9.4 Getting Help

If you need some assistance with using CommPortal, you can click on the Help icon:



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

A screenshot of a help page for the dashboard. The page has a light blue background. At the top, the word "Dashboard" is written in a bold, dark blue font. Below it, there are two paragraphs of text: "The dashboard provides a way to quickly access some of your key features." and "The dashboard is made up of the following panels." Below the text is a list of four items, each preceded by a small blue square icon: "Voicemail", "Missed Calls", "Contacts", and "Settings". All four items are underlined. Below the list, there are two sections. The first is titled "Voicemail" in bold blue text, followed by a paragraph: "At a glance view of how many new messages you have, and your total number of messages." and another paragraph: "Click the *View Messages* button to jump to the Messages & Calls page to listen to or manage your voicemails." The second section is titled "Missed calls" in bold blue text.

9.5 Refreshing a Page

If you want to refresh a page, for example to check whether you've received any new voicemails since you last looked, you can click on the Refresh icon:

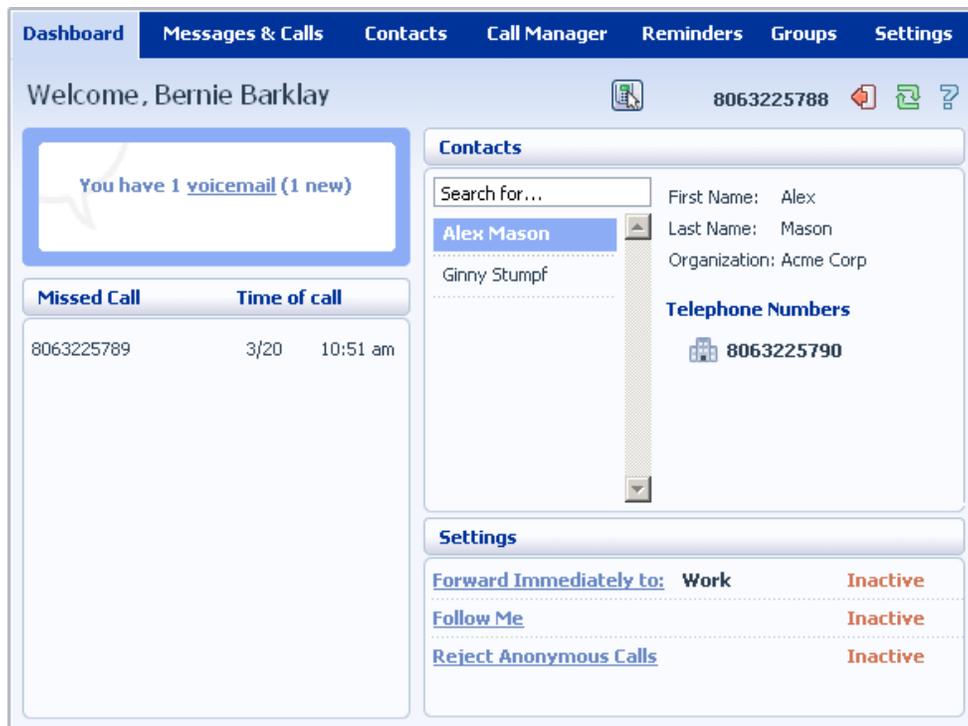
9.6 Logging Out

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

10 CommPortal Dashboard

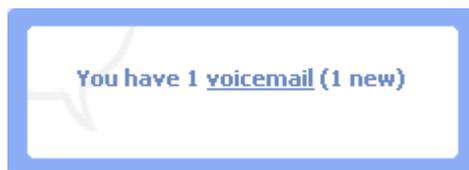
The CommPortal Dashboard is shown when you log into CommPortal and gives you an at-a-glance summary of your phone line. In this section we'll examine the Dashboard in more detail.

Here is an example Dashboard:



10.1 Messages

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



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 11.

10.2 Missed Calls

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

Missed Call	Time of call
8063225789	3/20 10:51 am

To see other types of calls, go the Messages & Calls page, described in Section 11.

10.2.1 Call Back

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

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

Missed Call	Time of call
8063225789	3/20 10:51 am
<div style="border: 1px solid black; padding: 2px; display: inline-block;">Dial 8063225789</div>	

10.3 Contacts

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

Contacts

Search for...

Alex Mason
Ginny Stumpf

First Name: Alex
Last Name: Mason
Organization: Acme Corp

Telephone Numbers

8063225790

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:

Contacts

mason

Alex Mason

First Name: Alex
Last Name: Mason
Organization: Acme Corp

Telephone Numbers

8063225790

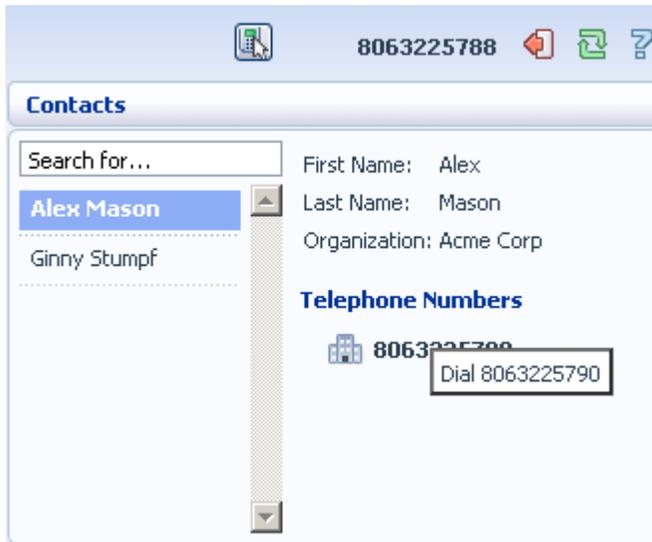
To cancel the search and view all of your contacts, delete the search text you entered.

To add, modify or delete Contacts, see Section 12.

10.3.1 Calling a Contact

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

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



10.4 Settings

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

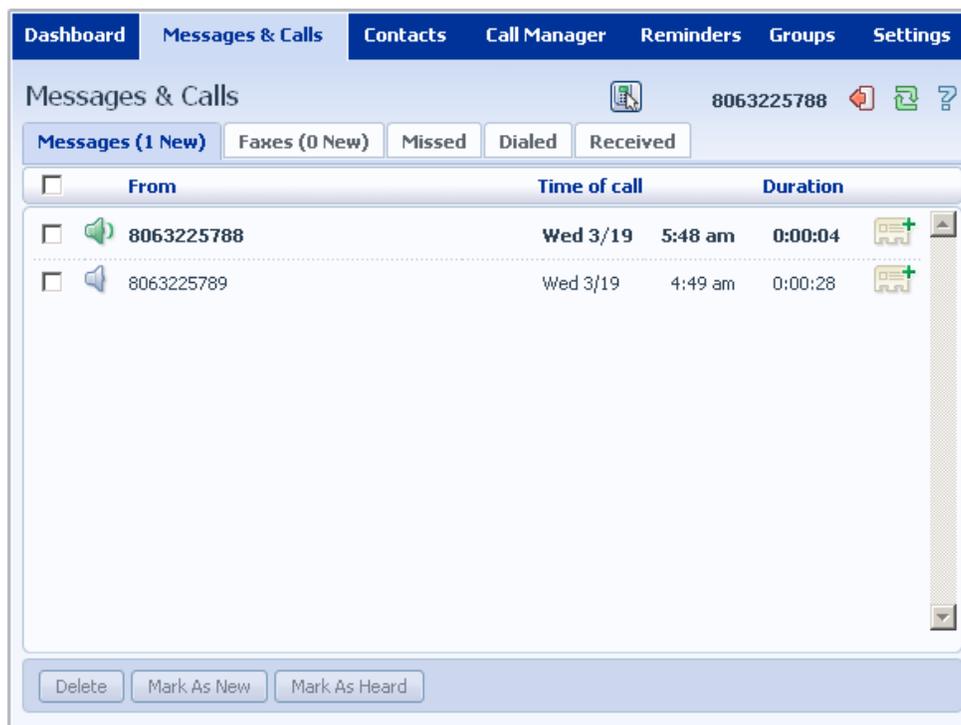
Settings		
Forward Immediately to:	Work	Inactive
Follow Me		Inactive
Reject Anonymous Calls		Inactive

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 13.

11 Messages & Calls

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

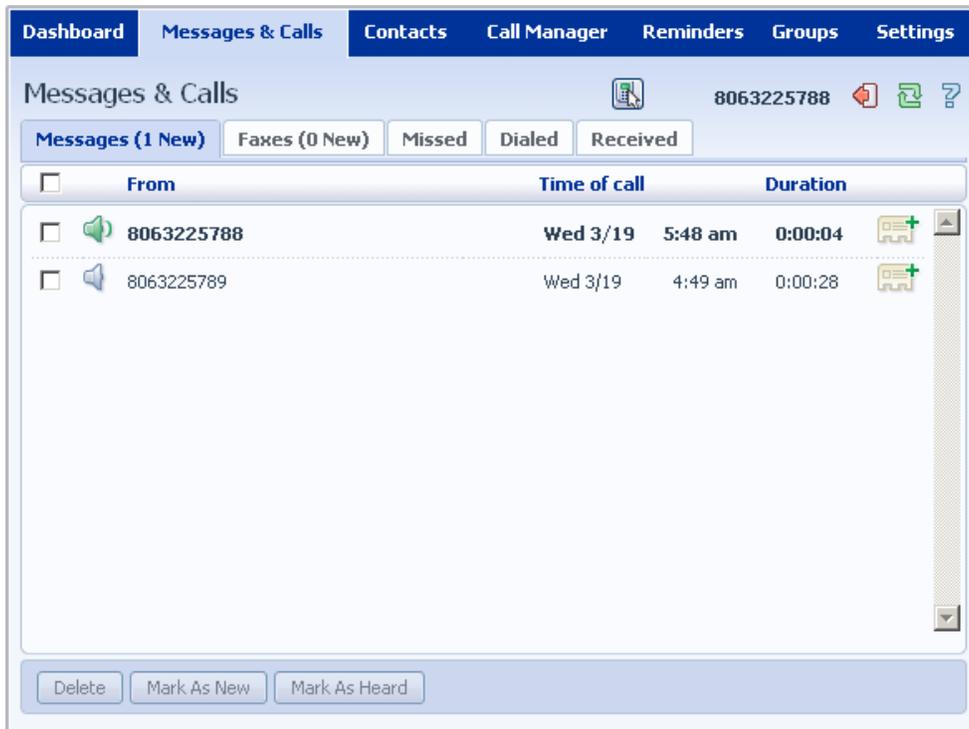


- **Messages** shows you all of your new and stored voice messages.
- **Faxes** shows you any new and stored fax messages.
- **Missed** displays the recent calls you have received and not answered.
- **Dialed** displays the recent calls you have made, including those made by Click To Dial as described in Section 18.
- **Received** shows the recent calls you have answered.

Each of these sections is described in more detail below.

11.1 Messages

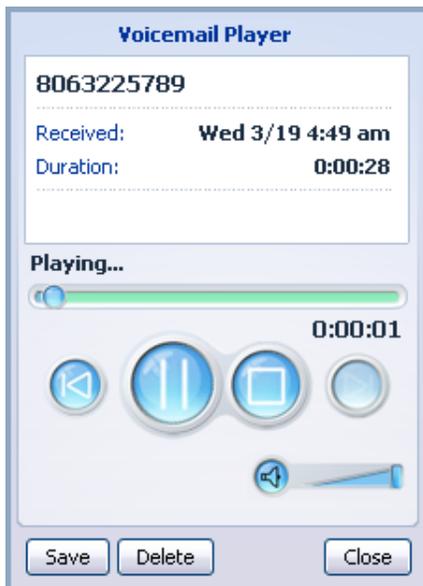
This shows you all stored voice messages, both those you have listened to and those you haven't. Unheard messages are shown in bold:



11.1.1 Listen To a Message

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

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



With this player you can:

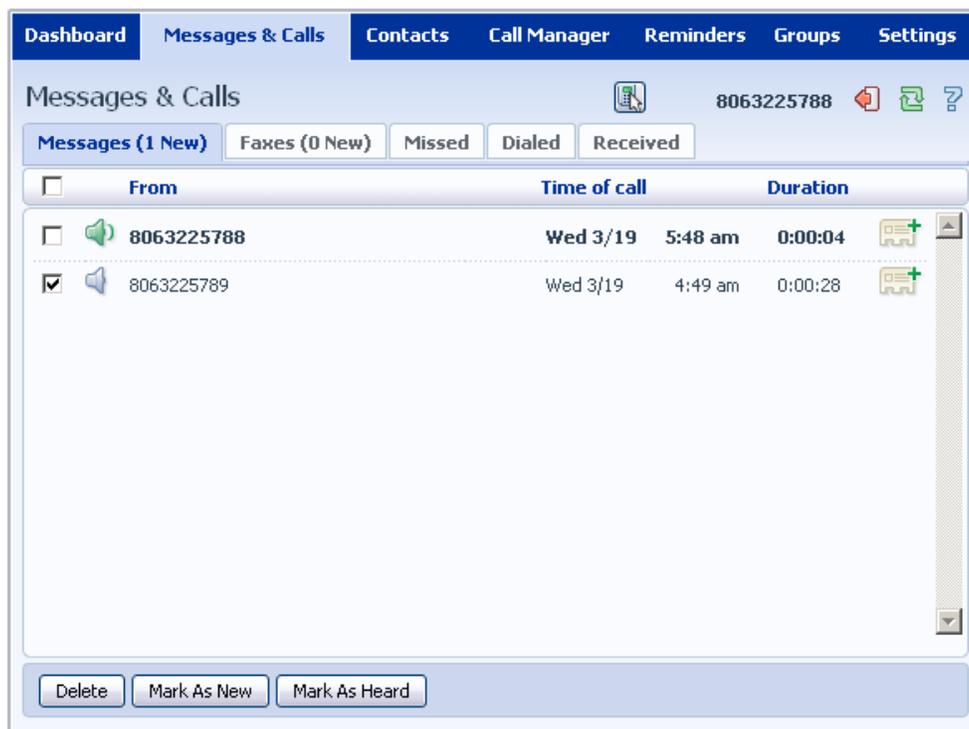
- See when the message was received and how long it is.
- Pause, rewind and fast forward the message.

- Mute the player or change the volume.
- Delete the message, or Save it to disk.
- Close the player.

11.1.2 Deleting a Message

To delete a voice message, follow these steps:

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

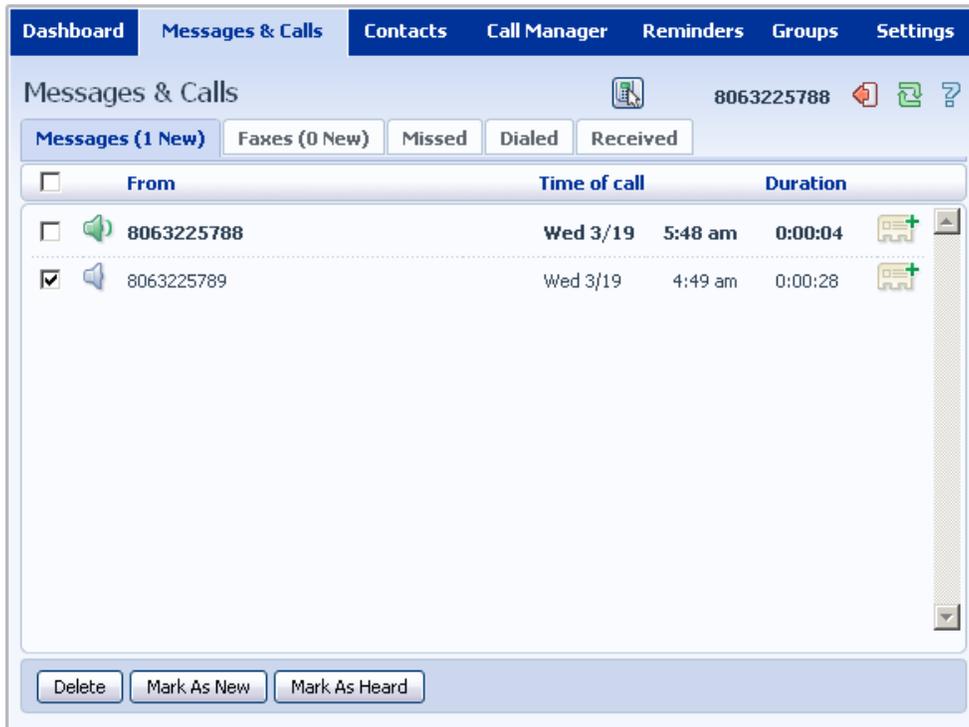


Click on *Delete*.

11.1.3 Marking a Message as Heard

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

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

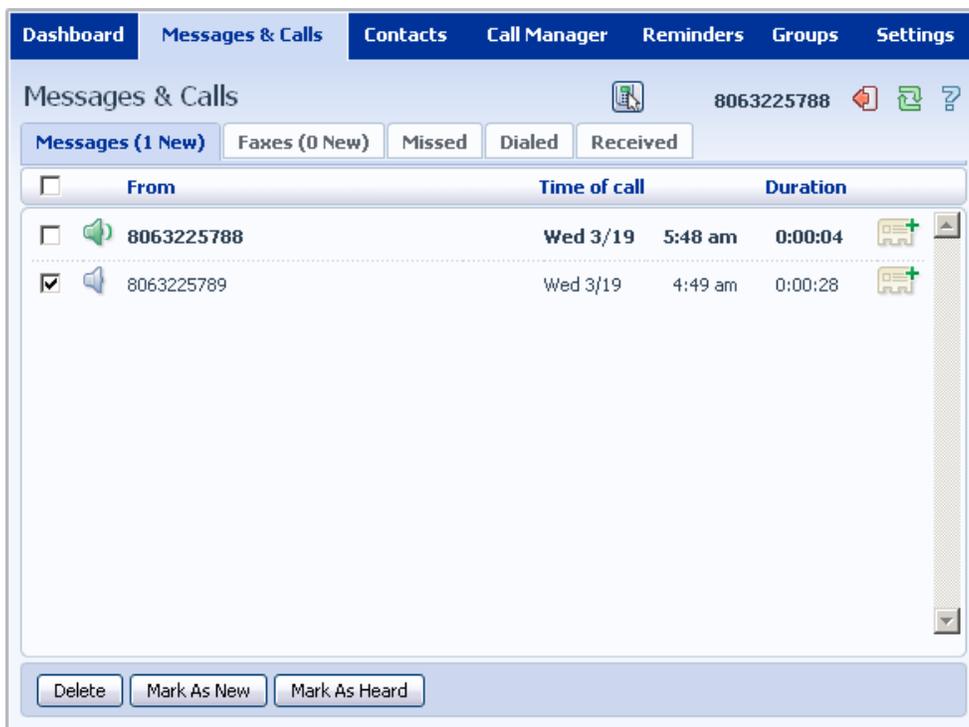


Click on *Mark As Heard*.

11.1.4 Marking a Message as New

To mark a message as new, follow these steps:

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

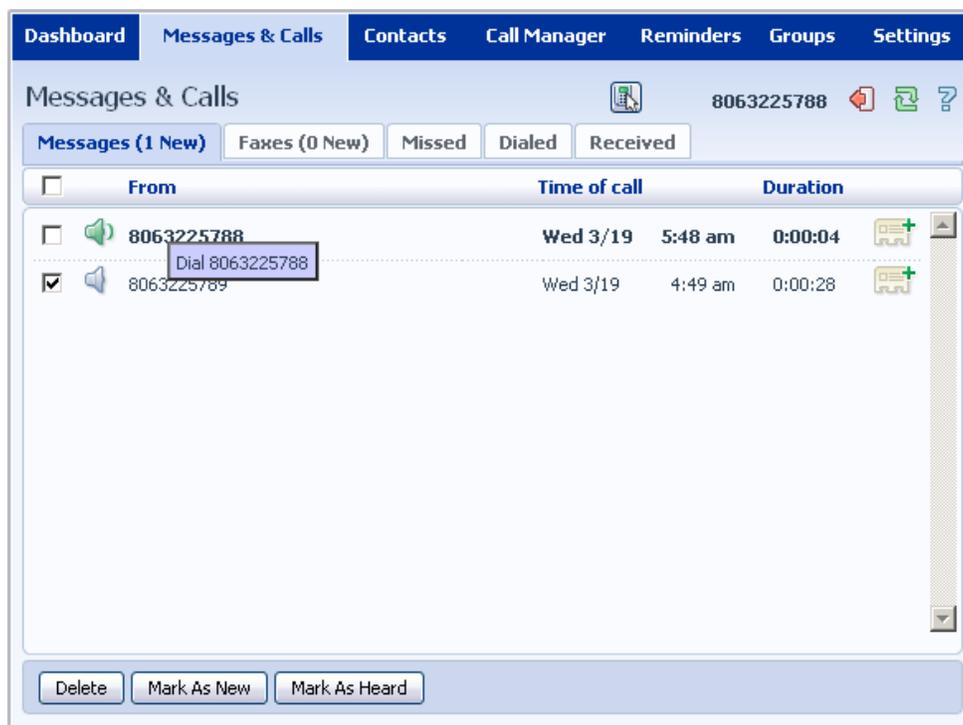


Click on *Mark As New*.

11.1.5 Call Back

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

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



11.1.6 Add Caller to Contacts

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

1. Click on the Add to Contacts icon to the right of the voicemail:  .
2. This will take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 12 for more information on using the Contacts page.

11.2 Faxes

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

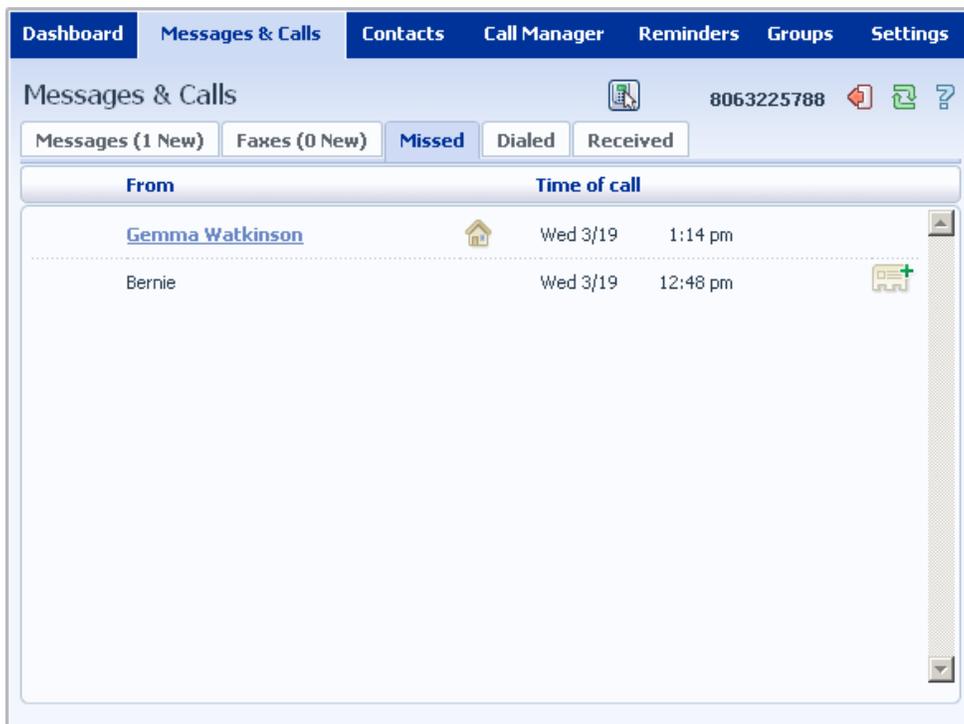
11.3 Missed

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

The screenshot shows the 'Messages & Calls' section of the TruConnect interface. The 'Missed' tab is active, showing a list of missed calls. The table has two columns: 'From' and 'Time of call'. The first entry is from the number 7034800518 on Wednesday, 3/19 at 1:14 pm. The second entry is from a contact named 'Bernie' on Wednesday, 3/19 at 12:48 pm. Each entry includes a small icon of a phone with a plus sign, indicating a missed call.

From	Time of call
7034800518	Wed 3/19 1:14 pm
Bernie	Wed 3/19 12:48 pm

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:



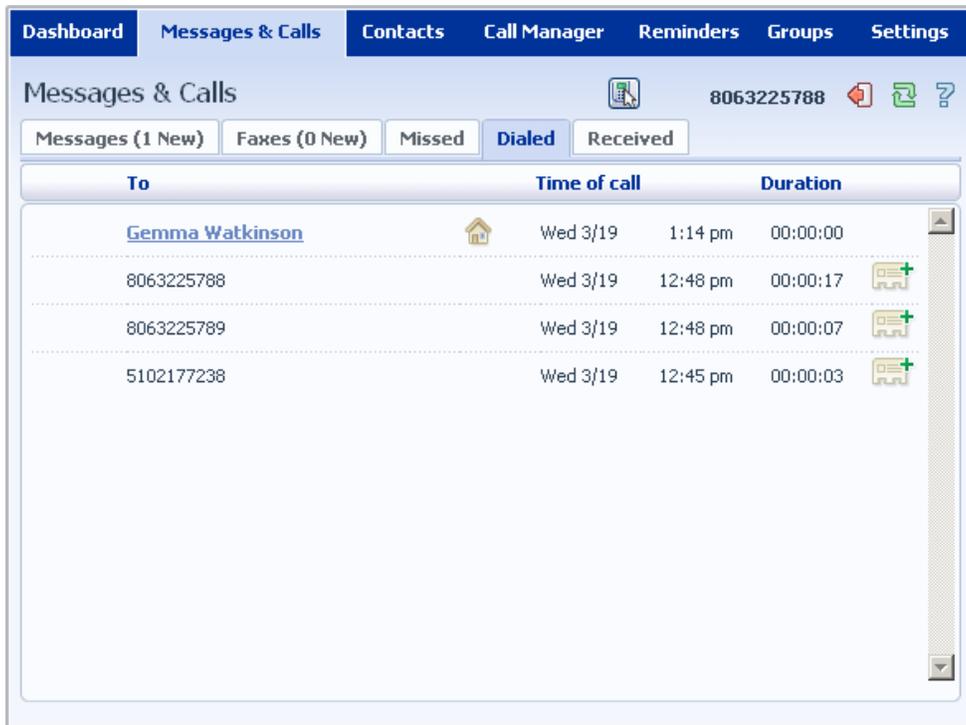
11.3.1 Add Caller to Contacts

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

1. Click on the Add to Contacts icon to the right of the call information: .
2. This will now take you to the Contacts page. Enter the details for your new contact and click on Save. See Section 12 for more information on this.

11.4 Dialed

This page shows you all of the recent calls you have made, including those which you made using Click To Dial (described in Section 18):



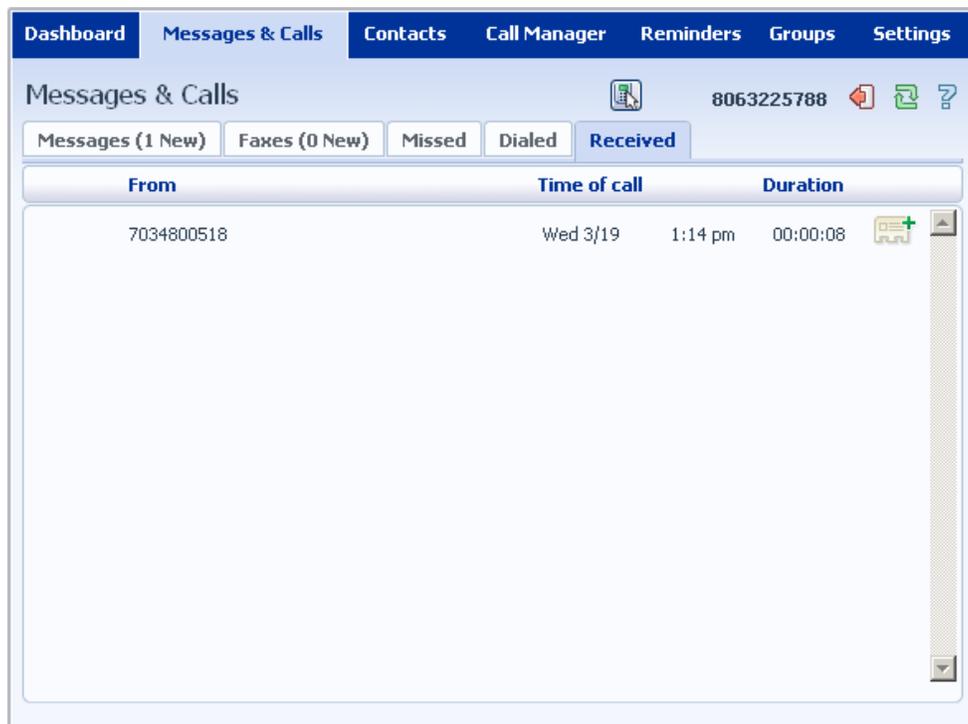
11.4.1 Add Dialed Number to Contacts

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

1. Click on the Add to Contacts icon to the right of the call information: .
2. This will now take you to the Contacts page. Enter the details for your new contact and click on Save. See Section 12 for more information on using the Contacts page.

11.5 Received

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



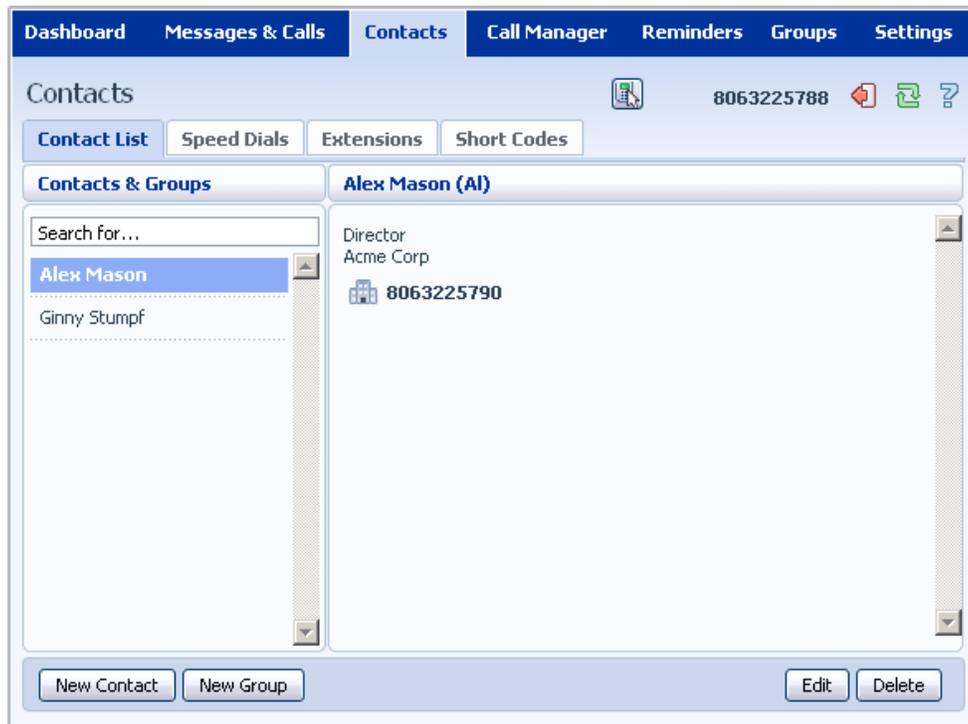
11.5.1 Add Number to Contacts

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

1. Click on the Add to Contacts icon to the right of the call information: 
2. This will now take you to the Contacts page. Enter the details for your new contact and click on Save. See Section 12 for more information on using the Contacts page.

12 Contacts

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

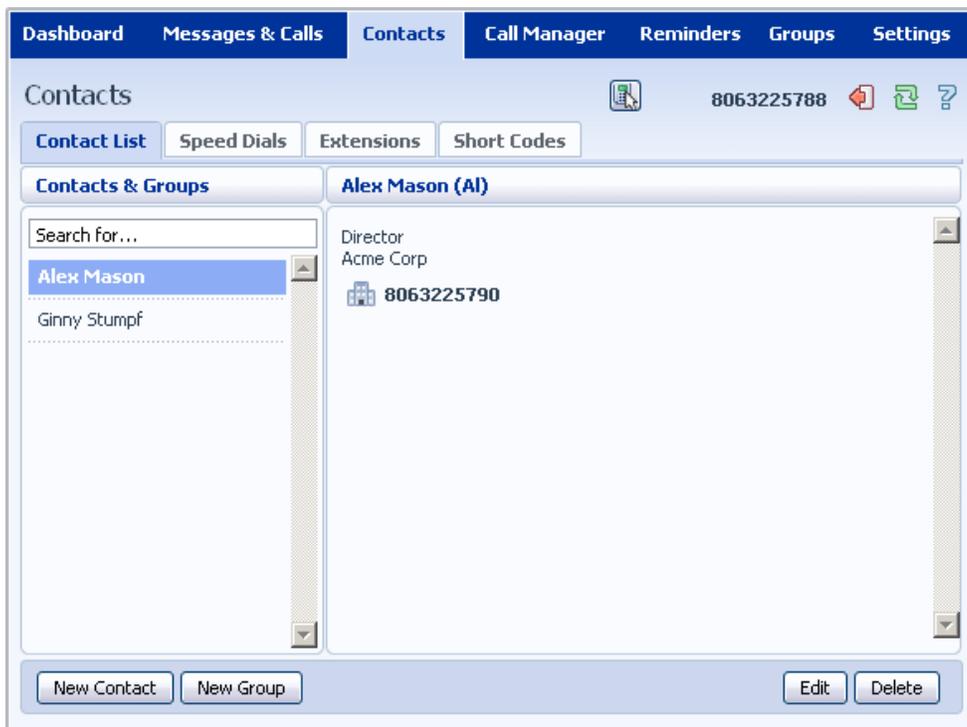


- **Contact List** allows you to manage your personal contact list.
- **Speed Dials** is where you configure your numeric speed dials.
- **Extensions** shows you the extensions within your business.
- **Short Codes** shows you your business's numeric speed dials.

Each of these sections is described in more detail below.

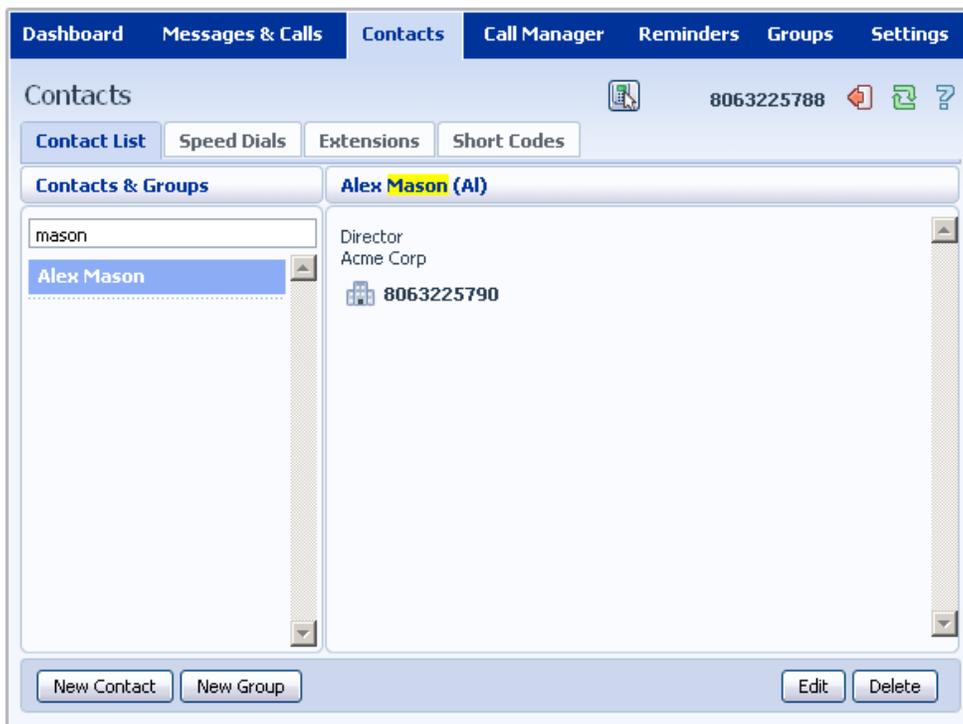
12.1 Contact List

The Contact List shows you all of your contacts:



12.1.1 Searching

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



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

12.1.2 Add a New Contact

To add a new Contact, follow these steps:

1. Click on *New Contact*.

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

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

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

The screenshot shows the 'Contacts' management interface. At the top, there are navigation tabs: Dashboard, Messages & Calls, **Contacts**, Call Manager, Reminders, Groups, and Settings. Below the tabs, the 'Contacts' section is active, displaying a search bar and a list of contacts: Alex Mason and Ginny Stumpf. To the right of the list is a form for editing or adding a contact. The form includes fields for:

- ZIP: []
- Country: []
- Address: [NewCorp address]
- City: [NewTown]
- State: [AnyState]
- ZIP: [00000]
- Country: [US]

 At the bottom right of the form are 'Save' and 'Cancel' buttons.

Hit Save.

You new contact will now have been added.

This screenshot shows the same 'Contacts' interface after a new contact has been added. The contact list now includes 'MyNew Contact' at the top, which is highlighted in blue. Below it are Alex Mason and Ginny Stumpf. The contact details for 'MyNew Contact (Newbie)' are displayed on the right:

- Name: Newbie
- Company: NewCorp
- Home Phone: 5555551234
- Address: NewCorp address
- City: NewTown
- State: AnyState
- ZIP: 00000
- Country: US

 At the bottom of the interface, there are buttons for 'New Contact', 'New Group', 'Edit', and 'Delete'.

12.1.3 Editing a Contact

To edit a contact, follow these steps:

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

12.1.4 Deleting a Contact

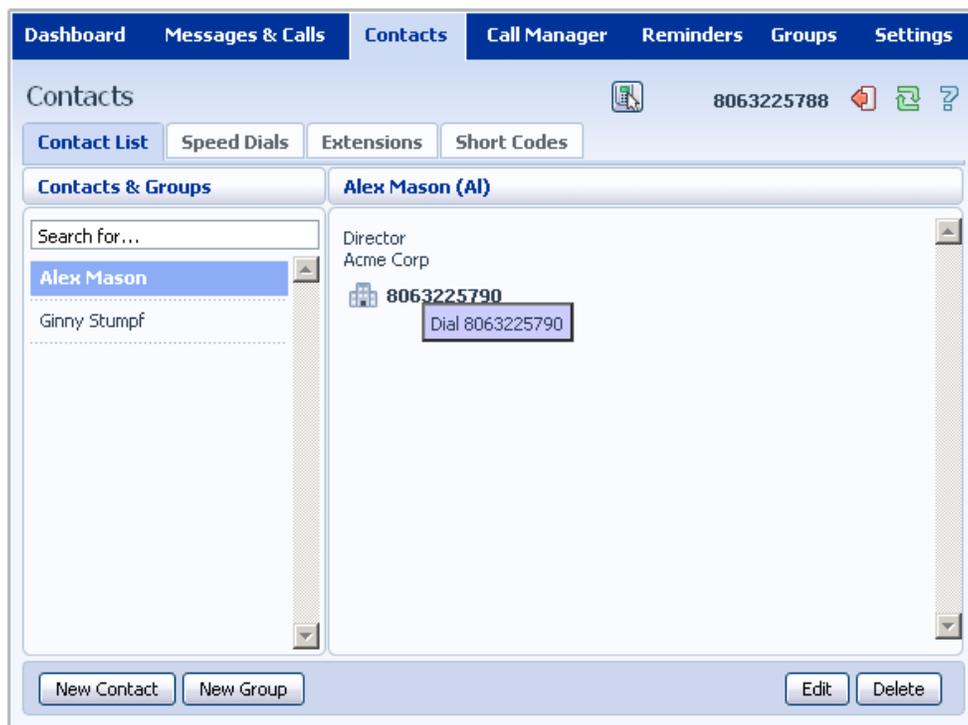
To delete a contact, follow these steps:

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

12.1.5 Calling a Contact

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

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



12.1.6 Groups

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

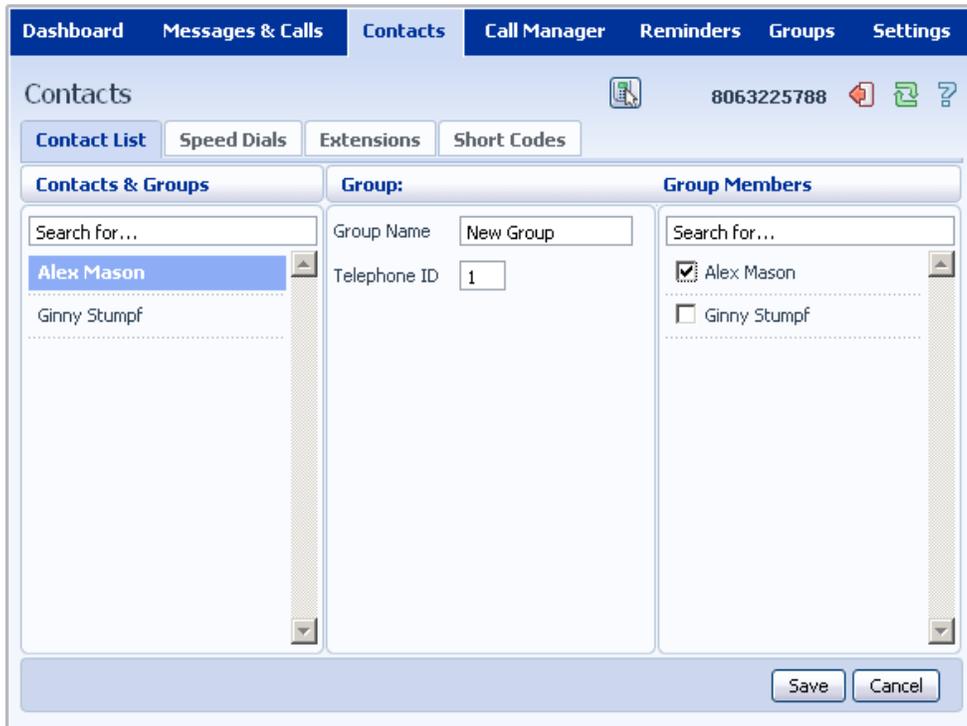
To add a new group, follow these steps:

1. Click on *New Group*.

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

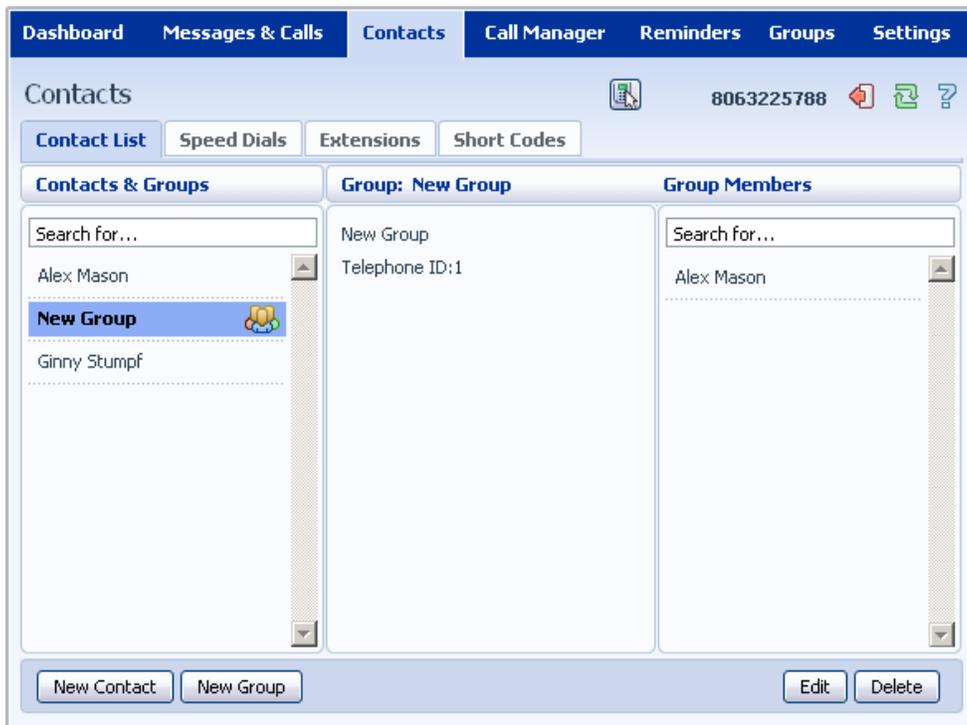
Enter an ID for the group in *Telephone ID*.

Select any contacts you want to be in the group from the list on the right hand side.



Click on Save.

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



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

To edit a group, follow these steps:

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

To delete a group, follow these steps:

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

12.2 Speed Dials

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

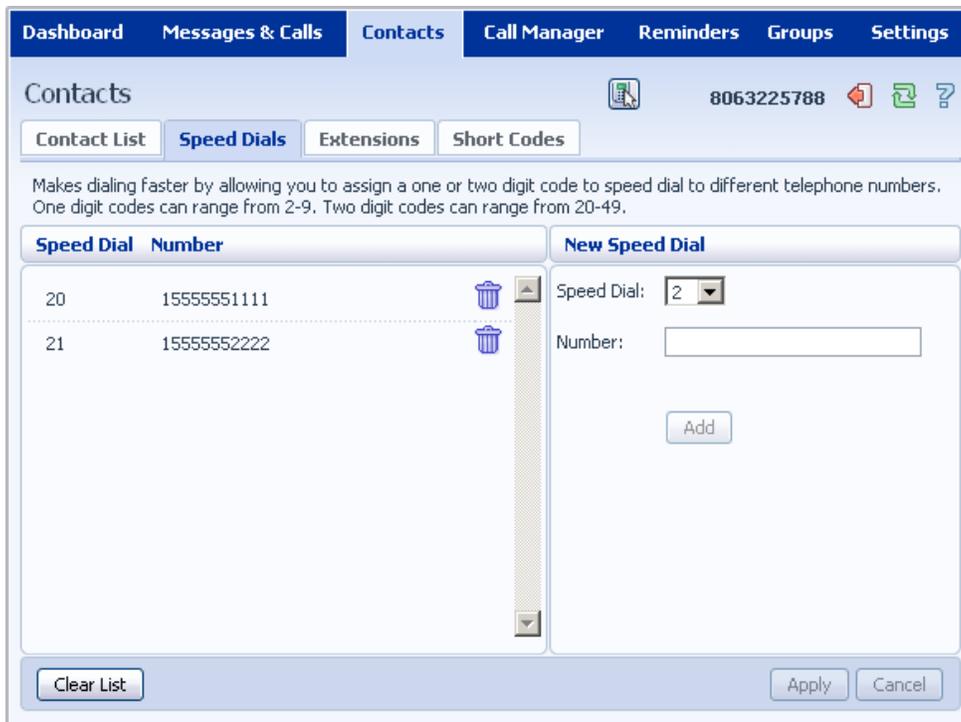
The screenshot shows the 'Contacts' section of the TruConnect interface. The 'Speed Dials' tab is selected. The interface includes a navigation bar with 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Reminders', 'Groups', and 'Settings'. Below the navigation bar, there are tabs for 'Contact List', 'Speed Dials', 'Extensions', and 'Short Codes'. The main content area is divided into two sections: 'Speed Dial' and 'New Speed Dial'. The 'Speed Dial' section contains the text 'You have no speed dials set up.' and a vertical scrollbar. The 'New Speed Dial' section has a 'Speed Dial' dropdown menu with '2' selected, a 'Number' input field, and an 'Add' button. At the bottom of the interface, 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 19.

12.2.1 Adding a Speed Dial

To add a speed dial, follow these steps:

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



12.2.2 Deleting a Speed Dial

To delete a Speed Dial, follow these steps:

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

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

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

12.3 Extensions

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

Contacts

8063225788

Contact List Speed Dials **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.

Telephone Number	Extension	Name	Department
Search for...			
8063225787	5787	Anna Axley	None
8063225788	5788	Bernie Barklay	None
8063225789	5789	Chris Carter	None
8063225790	5790	Deano Dickenson	None
8063225791	5791	MLHG Front desk pilot	None
8063225792	5792	Fred Finlay	None
8063225793	5793	Gail Girton	None
8063225794	5794	Harry Henryson	None
8063225795	5795	Ivan Ivanovich	None

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

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

Contacts 8063225788

Contact List Speed Dials **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.

Telephone Number	Extension	Name	Department
Search for...			
8063225787	5787	Anna Axley	None
8063225788	5788	Bernie Barklay	None
8063225789	5789	Chris Carter	None
8063225790	5790	Deano Dickenson	None
8063225791	5791	MLHG Front desk pilot	None
8063225792	5792	Fred Finlay	None
8063225793	5793	Gail Girton	None
8063225794	5794	Harry Henryson	None
8063225795	5795	Ivan Ivanovich	None

Your administrator sets up these Extensions.

12.4 Short Codes

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

Contacts

8063225788

Contact List Speed Dials Extensions **Short Codes**

Short codes allow you to quickly dial common numbers. The table below shows the short codes currently in operation.

Short Code	Telephone Number or Internal Code	Department
6001 - 6005	7034800501 - 7034800505	None
6006	5107485384	None

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

13 Call Manager

14 Incoming Call Manager (ICM)

Incoming Call Manager provides end-users with a powerful rules based routing services allowing them to configure when, where and which calls are delivered to them. Subscriber's use the advanced rules based routing to configure an advanced Sets of Rules for their incoming calls. For example, a subscriber might want to forward calls from family and friends to a home phone, while forwarding calls from the office directly to voicemail, or to screen calls from a particular number.

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

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

Each of these sections is described in more detail below.

14.1 Summary

The ICM 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.

The screenshot shows the 'Call Manager' interface with the 'Rules' tab selected. The page title is 'Call Manager' and the phone number is '(510) 217 1227'. The 'Rules' tab is active, and the 'When I receive a call' section is visible. The options are:

- Have my phone ring as normal
- Send it to voicemail immediately
- Forward it to:

Below these options, a yellow box contains the following text:

Call Manager rules allow you to:

- Handle incoming calls differently based on the time of day, the date and the caller.
- Ring several phones.

Click [here](#) for more details and to get started.

You haven't set your **weekly schedule** yet. Set it up now for greater flexibility: apply different rules at specific times or on different days of the week.

At the bottom right, there are 'Apply' and 'Cancel' buttons.

14.2 Rules Based Routing

Rules based routing allow the user to configure how all calls are routed based on a set of pre-configured rules. Rules based routing is configured by selecting the rules tab from the Incoming Call Manager page. If 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 rules will be created, "Normal", "Reject Calls and "Screen Calls".

For each rules, there will be to type of routing, match the call to a rule, and route calls not matching a rule. To modify how your "Normal" calls will be handled with no rules defined or when an inbound call does not match a rule, click on the "Normal Calls" Rule, then click on the link contained in the text under the "Normal" rule section

"This Set of Rules does not contain any rules for specific callers so when it is active, "all calls will ring your phone using the Standard Ringtone". To override this behavior for specific callers, click the "Add New Rule" button below."

From this page, you can select you can configure the following

1. Ring your phone with a standard or distinctive ringtone
2. Send the call to voicemail
3. Inform the caller that I am unavailable and reject the call

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

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

When no rules apply

have my phone ring using ▼

send the call to voicemail

forward the call to ▼

inform the caller that I am not available and reject the call

prompt the caller to record his or her name, then ring my phone and ask me whether I wish to accept the call

try to reach me by having more than one phone ring, together or in sequence

prompt the caller to record his or her name, then try to reach me by having more than one phone ring and ask me whether I wish to accept the call

< Back Next > Finish Cancel

In order to define a new rule for Normal calls, select the click on the Normal call rule and click the “Add New Rule” button.

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

Apply this rule to calls I receive from

this individual contact: <Select>

this group of contacts: <Select>

anyone on my contact list

anyone in my business group

this phone number: <enter a number>

a withheld number

< Back Next > Finish Cancel

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

1. This individual contact - Apply to individual contact (in your contact directory)
2. This group of contacts - Apply group of contacts as defined in my contact directory.
3. Anyone in my contact list – Apply to all callers for which you have a contact defined.
4. Anyone in my business group – Apply to all other members of your business, with the hosted PBX service.
5. This phone number – Apply to a specific phone number. Can be any number.
6. A withheld number – Apply to any caller that have restricted their calling number.

Select the individual or group of callers that this rule will apply to and click the “Next”

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

When I receive a call from anyone in my business group

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

< Back Next > Finish Cancel

button.

Next you will

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

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

To have the system route calls to one or more phones, select the appropriate option, click the “Next” button and follow the steps below.

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: <enter a number> Start: 0 End: 25 Add

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

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

< Back Next > Finish Cancel

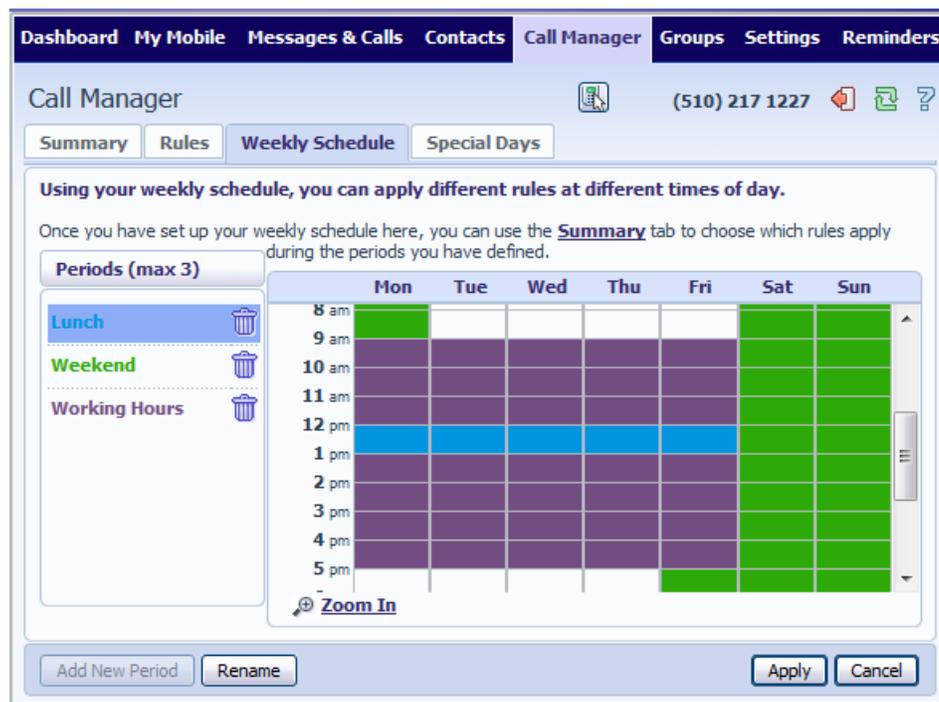
1. Add the first phone number to ring by entering a number in the Phone Number Field
2. Enter the start ring time and end ring time for the phone (one ring cycle is 6 seconds, however for mobile phones, you may have to allow more time depending on the mobile networks post dial delay)
3. Click the "Add" 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. Options are voicemail or any Dialable number.
7. Click Finish

14.3 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.

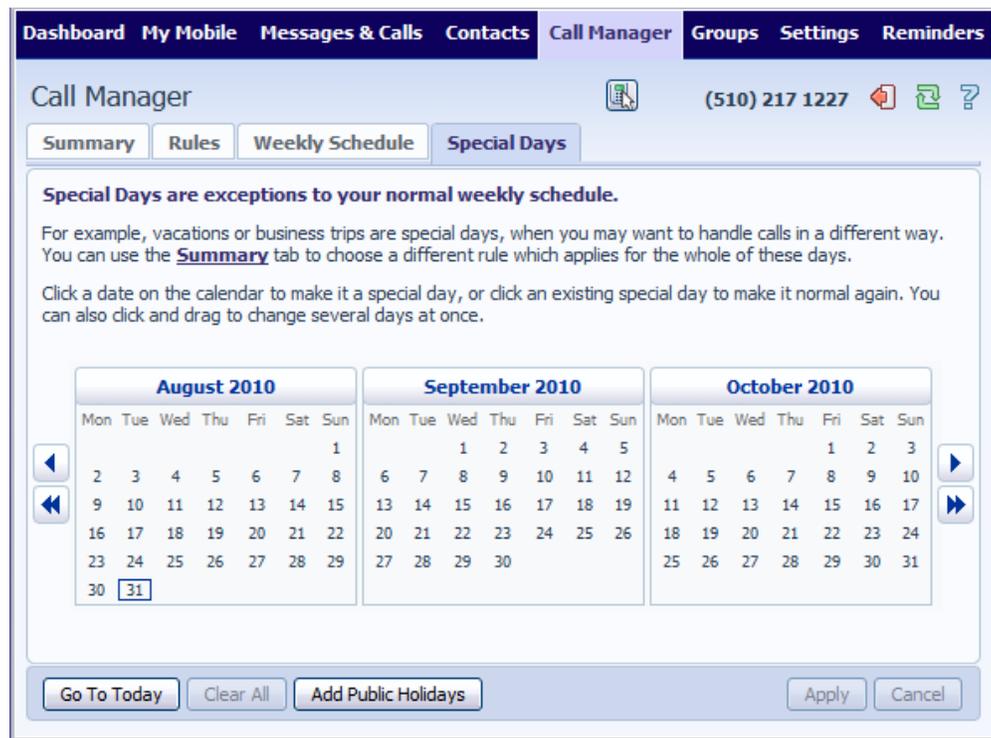
For ease of use, select option 2 - Begin with a typical weekly schedule that you can fine tune, and follow the steps below..



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

14.4 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:



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

15 Reminders

The Reminders page lets you set up reminder calls:

The screenshot shows the 'Reminders' page in a web application. At the top, there is a navigation bar with tabs for 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Reminders', 'Groups', and 'Settings'. The 'Reminders' tab is selected. Below the navigation bar, the page title is 'Reminders'. To the right of the title, there is a phone number '8063225788' and three icons: a calendar, a refresh, and a help icon. The main content area is divided into two sections: 'Occurs' and 'Time' on the left, and 'New Reminder' on the right. The 'Occurs' section contains the text 'You have no reminders.' The 'Time' section is empty. The 'New Reminder' section contains a text box with the instruction 'You can configure reminders either to occur once in the next 24 hours, or to repeat daily or weekly.' Below this, there is a dropdown menu for 'Occurs' with 'Select' as the current selection. Below that, there is a time selection area with three input fields: '9' for the hour, '30' for the minutes, and 'am' for the period. Below these fields are the labels 'Hour', 'Min', and 'am/pm'. At the bottom of the 'New Reminder' section is an 'Add' button. At the bottom of the entire page, there are three buttons: 'Clear List', 'Apply', and 'Cancel'.

15.1 Adding Reminders

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

New Reminder

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

Occurs:

Time:

Hour Min am/pm

To add a new reminder, follow these steps:

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:

New Reminder

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

Occurs:

Time:

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

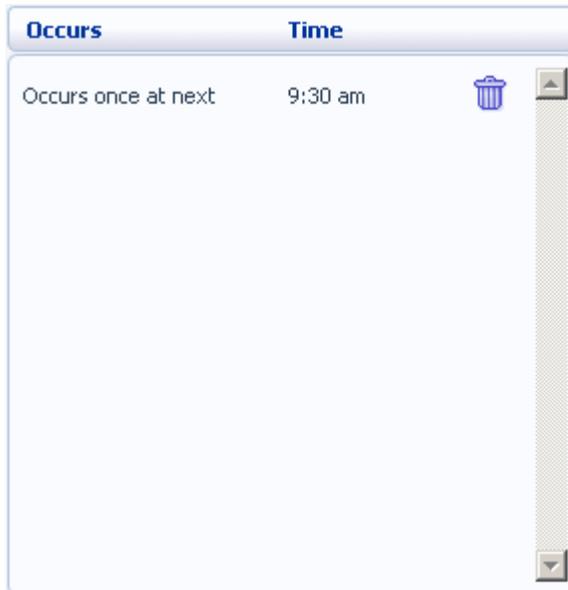
Enter the time you would like the reminder call using the *Time* boxes and dropdown list.

Click on *Add*.

Click on *Apply*.

15.2 Deleting Reminders

To delete a reminder, you use the Reminders list:



To delete a reminder, follow these steps:

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

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

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

16 Groups

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

The screenshot shows the 'Groups' page in the TruConnect interface. The navigation bar includes 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Reminders', 'Groups', and 'Settings'. The 'Groups' page title is 'Groups' with a search icon and the phone number '8063225788'. Below the title, a message states: 'The table below lists the MADN, MLHGs and Call Pickup Groups (CPUGs) you are a member of. Click on one of the groups to view detailed information.'

The 'Group Membership' section shows a list of groups: 'MLHG : Front desk' (selected) and 'CPUG: Executives'. The 'MLHG: Front desk' group details are shown on the right:

- Department: None
- Number of Lines: 2 (Logged in: 1)
- Status: You are currently not logged in to this MLHG ([Login](#))

A table lists the members of the 'MLHG: Front desk' group:

Position	Number	Extension	Name
1	8063225788	5788	Bernie Barklay
2	8063225787	5787	Anna Axley

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.

16.1 Multi Line Hunt Groups

16.1.1 Viewing Multi Line Hunt Groups

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

The screenshot shows the 'Groups' page in the TruConnect interface. The navigation bar includes Dashboard, Messages & Calls, Contacts, Call Manager, Reminders, Groups, and Settings. The 'Groups' section is active, displaying a list of groups under 'Group Membership'. The selected group is 'MLHG: Front desk'. The details for this group are as follows:

- Department:** None
- Number of Lines:** 2 (Logged in: 1)
- Status:** You are currently not logged in to this MLHG ([Login](#))

A table below the details lists the lines in the group:

Position	Number	Extension	Name
1	8063225788	5788	Bernie Barklay
2	8063225787	5787	Anna Axley

The following information is shown:

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

16.1.2 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: 

16.2 Call Pickup Groups

16.2.1 Viewing Call Pickup Groups

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

The screenshot shows the 'Groups' page in the TruConnect interface. The top navigation bar includes 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Reminders', 'Groups', and 'Settings'. The 'Groups' page title is displayed, along with a user ID '8063225788' and several icons. Below the title, a message states: 'The table below lists the MADN, MLHGs and Call Pickup Groups (CPUGs) you are a member of. Click on one of the groups to view detailed information.'

The main content area is divided into two sections: 'Group Membership' and 'CPUG: Executives'. Under 'Group Membership', there is a list of groups, including 'MLHG : Front desk' and 'CPUG: Executives'. The 'CPUG: Executives' group is selected, and its details are shown:

- Department: None
- Number of Lines: 3

Below the details is a table listing the members of the group:

Number	Extension	Name
8063225787	5787	Anna Axley
8063225788	5788	Bernie Barklay
8063225789	5789	Chris Carter

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.

16.2.2 Using Call Pickup

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

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

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

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

16.3 Multiple Appearance Directory Numbers

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

The screenshot shows the 'Groups' section of the TruConnect interface. The top navigation bar includes 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Reminders', 'Groups', and 'Settings'. The 'Groups' page displays a list of groups under 'Group Membership'. One group is selected: 'MADN: 8063225791'. Below this, the 'CPUG: Executives' is listed. The main details pane for this group shows 'MADN: 8063225791' and 'Department: None'. It also indicates 'Number of Lines: 1'. A table below lists the lines in the group:

Number	Extension	Name
8063225788	5788	Bernie Barklay

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.

17 Settings

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

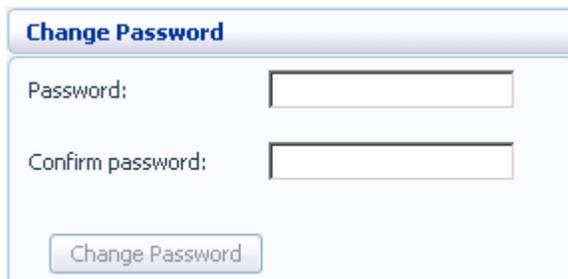
- *Security* lets you change your passwords and PINs.
- *Account Codes* lets you set up your account codes, if you have appropriate permissions.
- *Blocking* lets you set up blocking for different types of outgoing calls.
- *Preferences* lets you configure a number of properties which apply to your phone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

17.1 Security

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

17.1.1 Changing Your CommPortal Password

The Change Password section lets you change you CommPortal password:

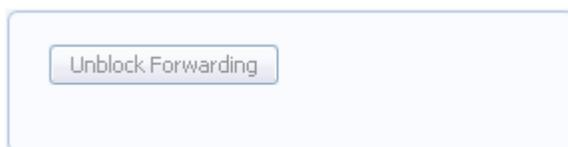
A screenshot of a web form titled "Change Password". The form has a light blue header with the title. Below the header, there are two text input fields. The first is labeled "Password:" and the second is labeled "Confirm password:". Below the input fields is a button labeled "Change Password".

To change your CommPortal password, follow these steps:

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

17.1.2 Unblocking Remote Access to Call Forwarding

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

A screenshot of a single button labeled "Unblock Forwarding". The button is light blue with rounded corners and is centered within a larger light blue rectangular frame.

For more details on Remote Access to Call Forwarding see the *MetaSwitch Hosted IP PBX End User Quick Start Guide*.

17.1.3 Changing your PINs

You have two different PINs.

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

To change either of these PINs, follow these steps:

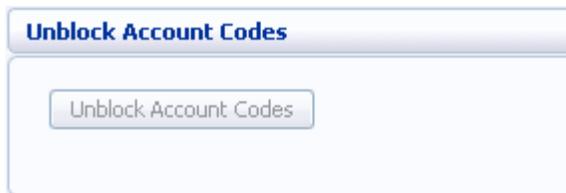
1. Enter the new PIN in either the *Call Services PIN* or *Voicemail PIN* text box.
2. Click on *Change* to the right of your new PIN.



The image shows a web form titled "Change PIN". It contains two rows of input fields. The first row is for "Call Services PIN" with a text box containing "0000" and a "Change" button to its right. The second row is for "Voicemail PIN" with an empty text box and a "Change" button to its right.

17.1.4 Unblocking Account Codes

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

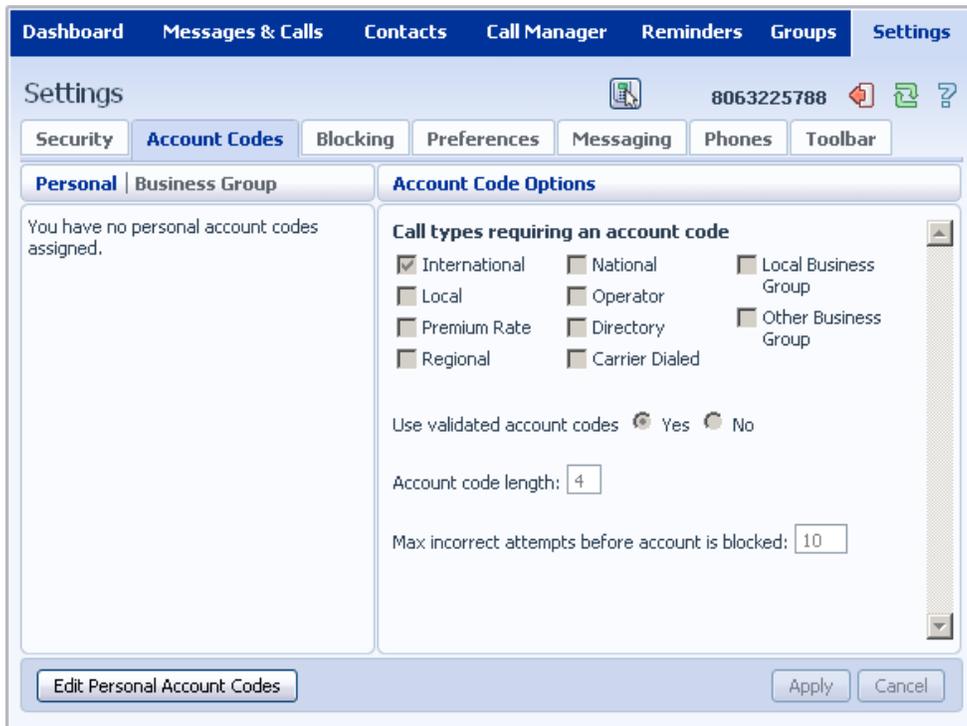


The image shows a web form titled "Unblock Account Codes". It contains a single button labeled "Unblock Account Codes" centered within the form area.

For more details on Account Codes, see Sections 8.4 and 17.2 or speak to your administrator.

17.2 Account Codes

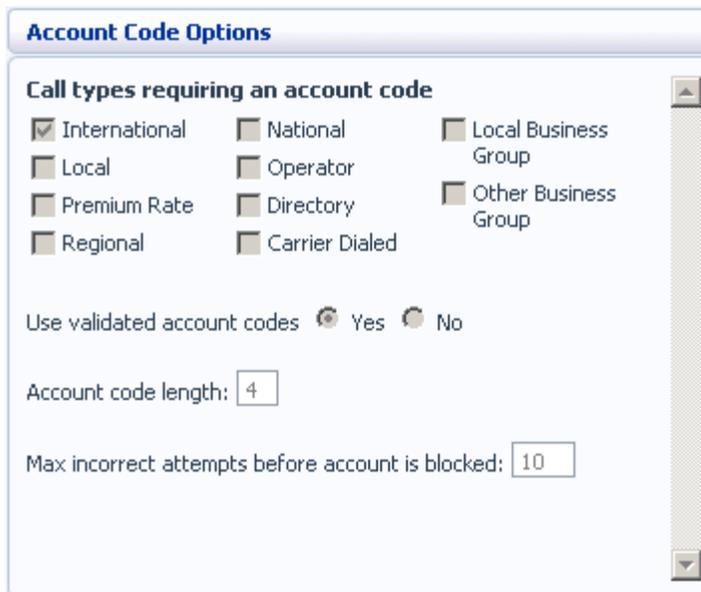
The Account Codes tab lets you configure your Account Codes service. Exactly what is configurable within this section will depend on the permissions that your administrator has given you.



For more details on the Account Codes services, see Section 8.4 or speak to your administrator.

17.2.1 Account Code Options

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

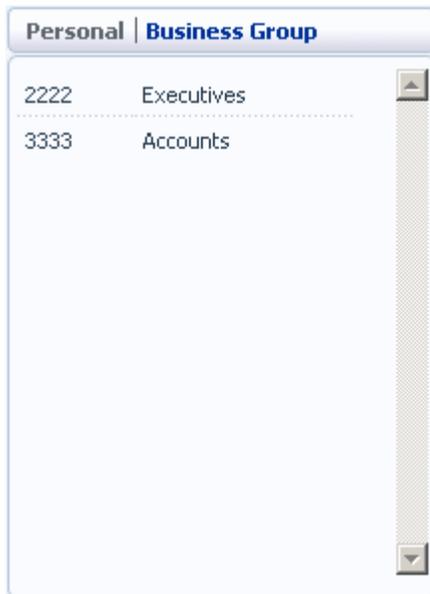


- *Call types requiring an account code* show you the types of calls which will require you to enter a code once you have dialed the number. In the example above, account codes are only required for International calls.

- *Use validated account codes* specifies whether your system uses validated or 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.

17.2.2 Business Account Codes

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



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: 'Account Code' and 'Business Group'. The table contains two rows: '2222' for 'Executives' and '3333' for 'Accounts'. A vertical scrollbar is visible on the right side of the table.

Account Code	Business Group
2222	Executives
3333	Accounts

17.2.3 Personal Account Codes

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

Personal | Business Group

You have no personal account codes assigned.

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

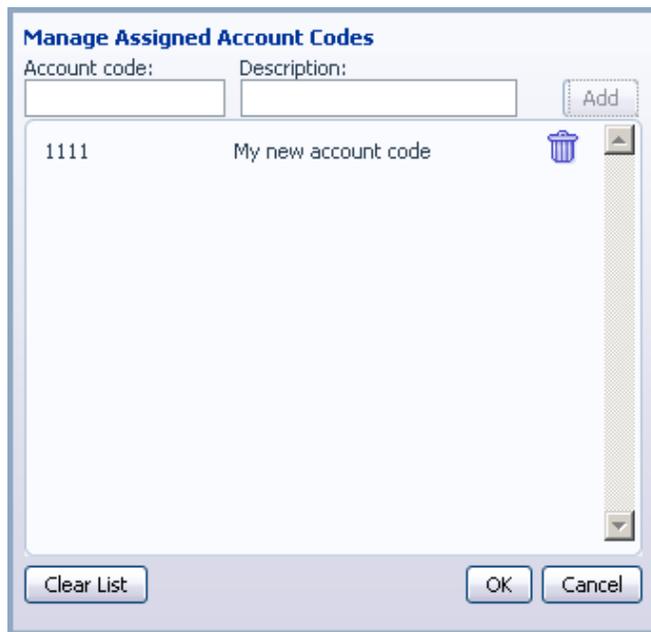
Manage Assigned Account Codes

Account code: Description:

You have no account codes assigned.

To add an account code, follow these steps:

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



To delete an account code, follow these steps:

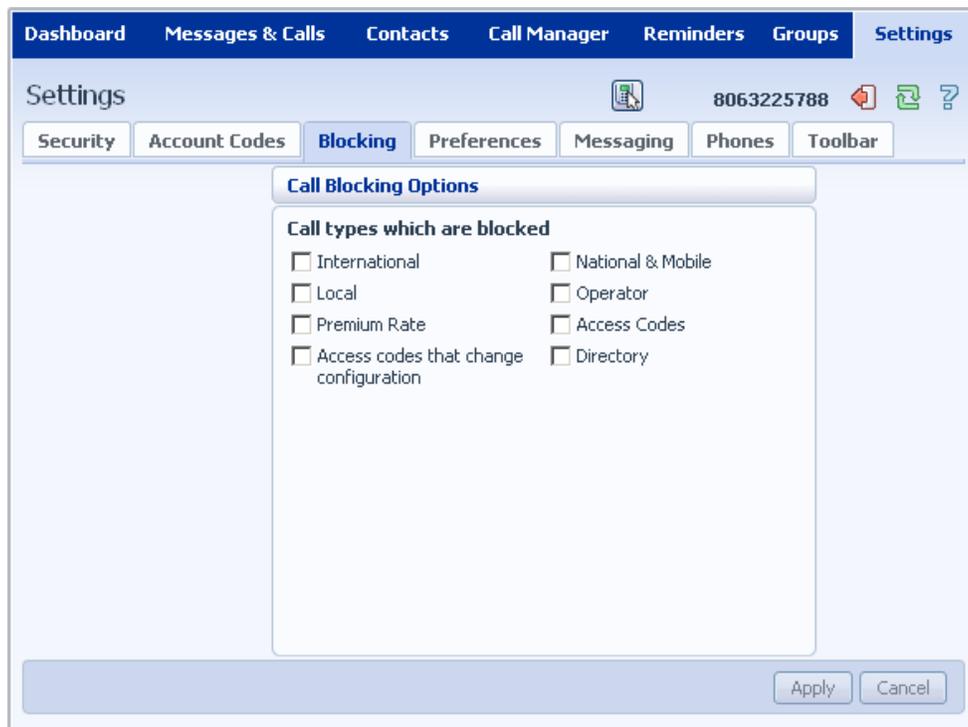
1. Click on the Trash Can icon to the right of the account code: 
2. Click on *OK*.
3. Click on *Apply*.

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

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

17.3 Blocking

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



To block certain types of call, follow these steps:

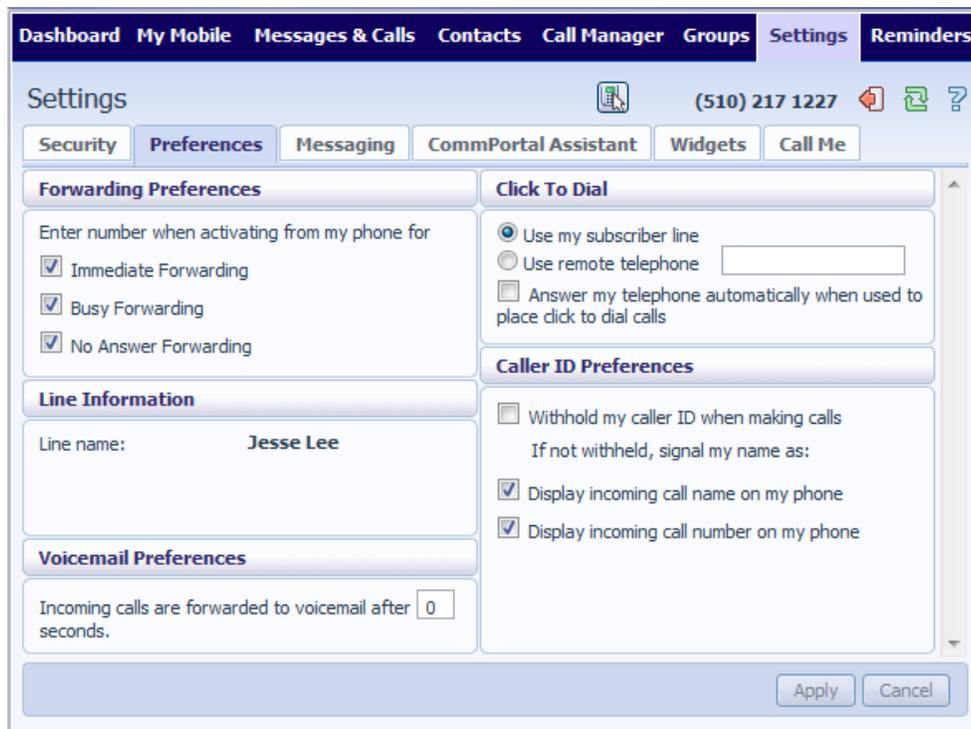
1. Check the type of call you want to block.
2. Hit *Apply*.

To unblock a type of call, follow these steps:

1. Uncheck the type of call you want to allow.
2. Click on *Apply*.

17.4 Preferences

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

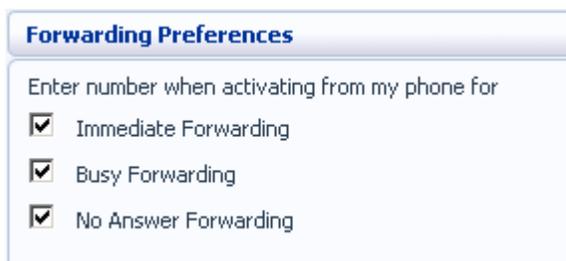


17.4.1 Forwarding Preferences

The Forwarding Preferences section lets you configure whether, when you dial the Call Forwarding access codes to enable Call Forwarding, you need to enter a phone number. If you don't want to enter a phone number then your Call Forwarding service will use the number you last configured through CommPortal.

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

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



17.4.2 Line Information

The Line Information section shows you information about your line:

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

17.4.3 Voicemail Preferences

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

Voicemail Preferences

Incoming calls are forwarded to voicemail after seconds.

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

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

17.4.4 Click To Dial

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

Click To Dial

Use my subscriber line

Use remote telephone

Answer my telephone automatically when used to place click to dial calls

For more information on using Click To Dial, see Section 18.

If you want to use your regular phone for your calls using Click To Dial, follow these steps:

1. Select *Use my subscriber line*.
2. Click on *Apply*.

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

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

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

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

17.4.5 Caller ID Preferences

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

Caller ID Preferences

Withhold my caller ID when making calls
If not withheld, signal my name as: *Berrie*

Display incoming call name on my phone

Display incoming call number on my phone

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

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

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

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

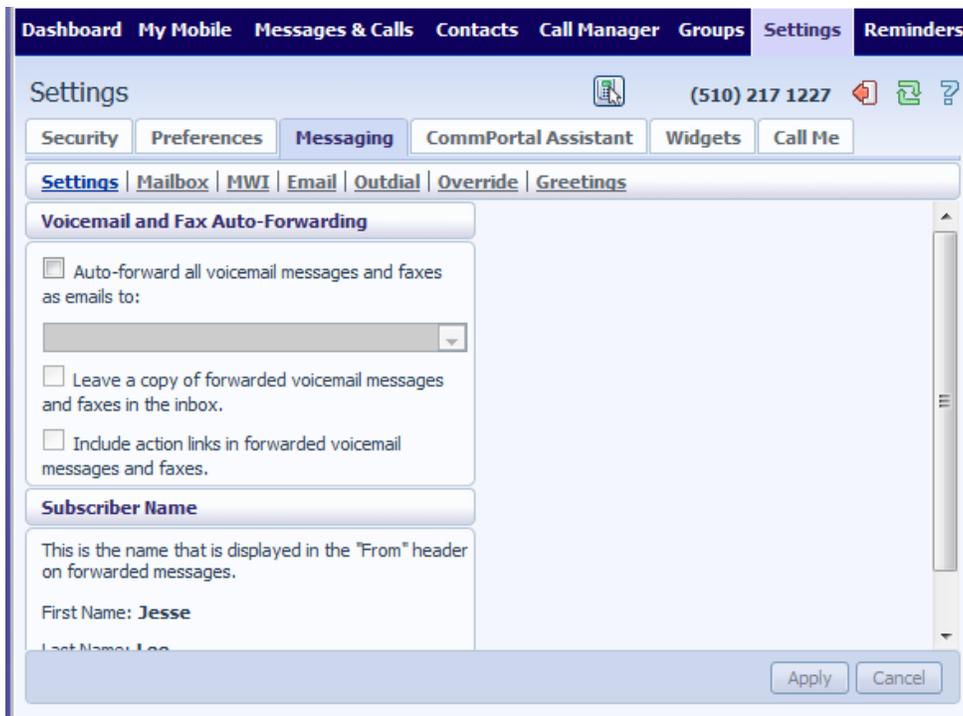
To display the number of a caller when your phone rings, follow these steps:

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

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

17.5 Messaging

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



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

17.5.1 Settings

Timezone

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

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

Subscriber Timezone

Timezone setting used by all services:

(GMT-5.00) America/Eastern

Voice and Fax Forwarding

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

Voicemail and Fax Auto-Forwarding

Auto-forward all voicemail messages and faxes as emails to:

Leave a copy of forwarded voicemail messages and faxes in the inbox.

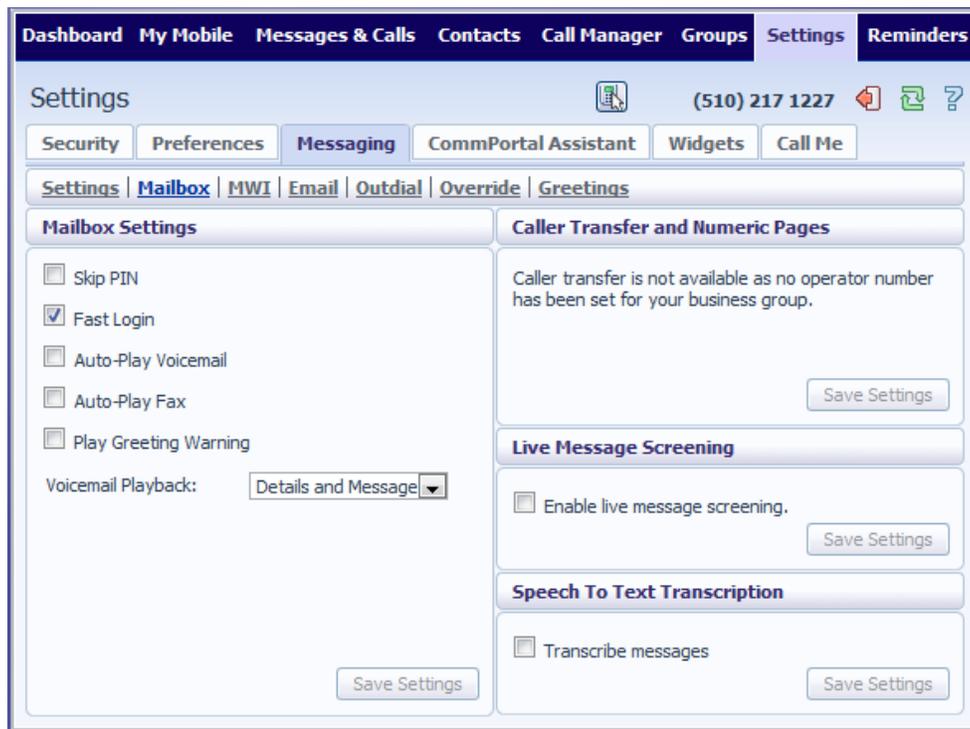
Include action links in forwarded voicemail messages and faxes.

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

1. Check *Auto-forward all voicemail messages and faxes to this email address*.
2. Enter your email address in the text box.
3. If you want to also leave a copy of the message in your mailbox (so you can view them in CommPortal), check *Leave a copy of forwarded voicemail messages and faxes in the inbox*.
4. If you would like to be able to include action links such as delete in the email copies of your voice messages, select the *Include action links in forwarded voicemail messages and faxes*.
5. Click on *Apply*.

17.5.2 Mailbox

The Mailbox section lets you configure your mailbox settings:

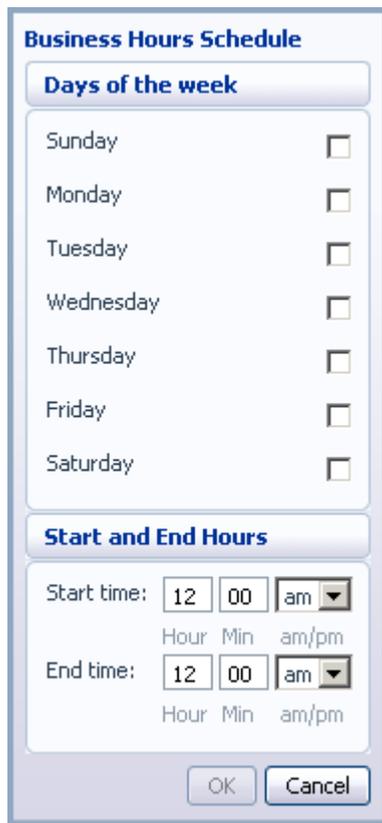


Greetings

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

1. Select the greeting you have recorded from the drop-down list.

Click on the *business hours* link:



Business Hours Schedule

Days of the week

Sunday	<input type="checkbox"/>
Monday	<input type="checkbox"/>
Tuesday	<input type="checkbox"/>
Wednesday	<input type="checkbox"/>
Thursday	<input type="checkbox"/>
Friday	<input type="checkbox"/>
Saturday	<input type="checkbox"/>

Start and End Hours

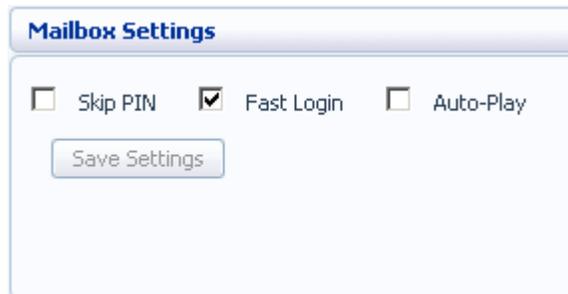
Start time:
Hour Min am/pm

End time:
Hour Min am/pm

Define your business's hours of operation, by selecting the days you operate, and the times you operate between. Then click on **OK**.

Click on **Save Settings**.

Mailbox Settings



Mailbox Settings

Skip PIN Fast Login Auto-Play

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

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

To disable the Skip PIN setting, follow these steps:

1. Uncheck *Skip PIN*.

2. Click on *Save Settings*.

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

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

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

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

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

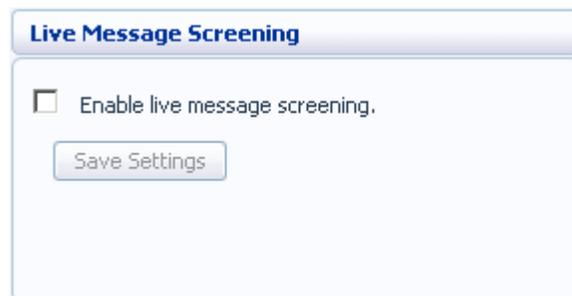
1. Check *Auto-Play*.
2. Click on *Save Settings*.

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

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

Live Message Screening

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



Live Message Screening

Enable live message screening.

Save Settings

To enable Live Message Screening, follow these steps:

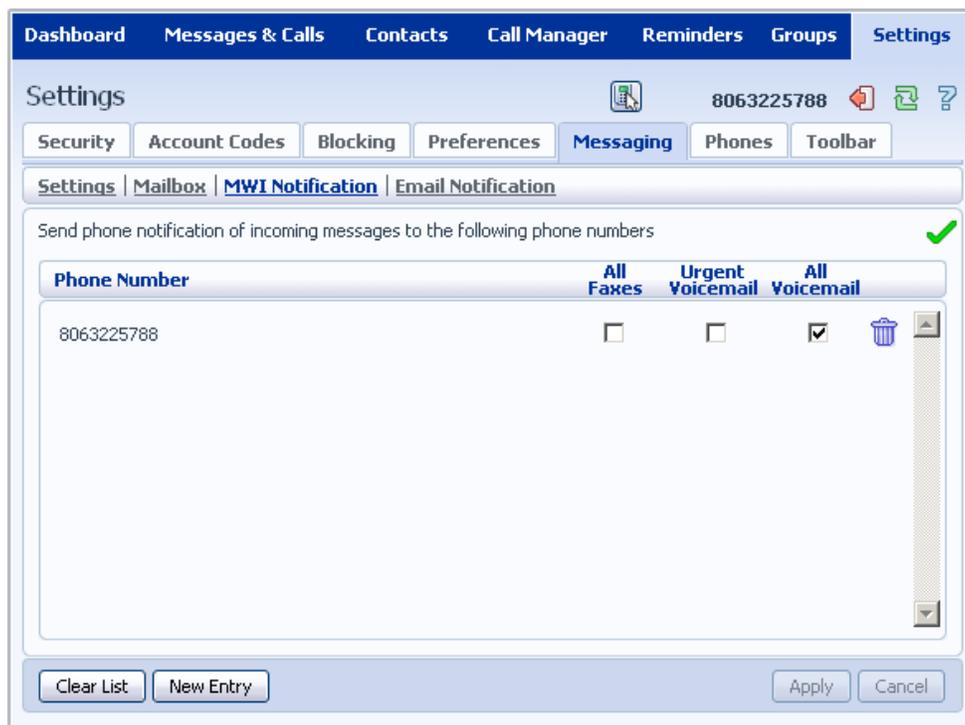
1. Check *Enable live message screening*.
2. Click on *Save Settings*.

To disable Live Message Screening, follow these steps:

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

17.5.3 MWI Notification

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



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

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

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

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

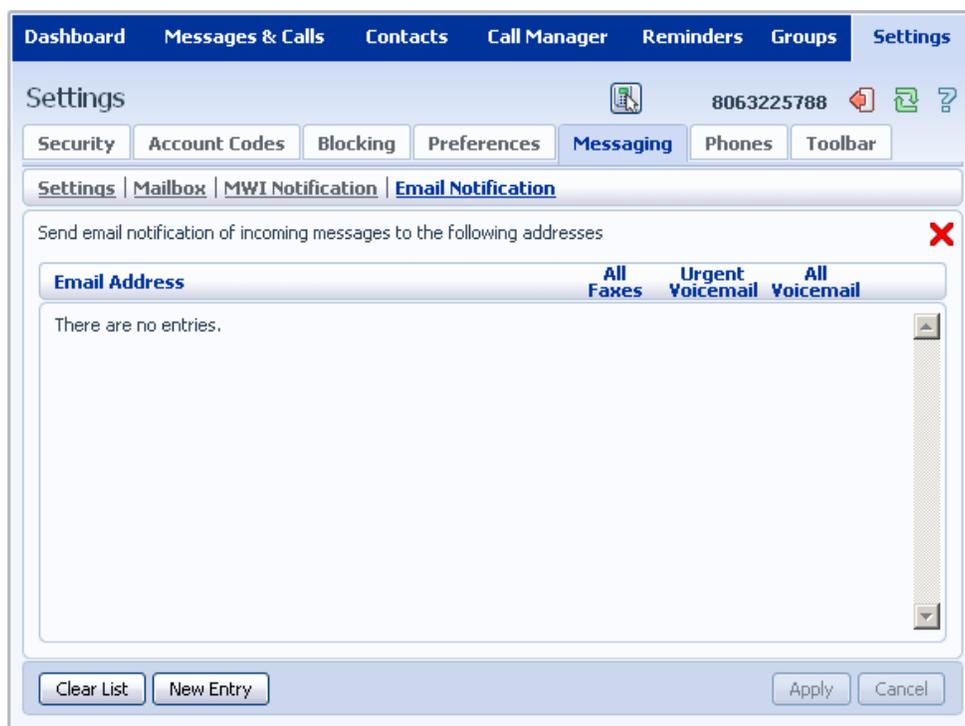
To have only urgent new voice messages light your phone’s messages light, follow these steps:

1. Check *Urgent Voicemail*.

2. If there is a red cross on the screen:  click it so that it becomes a green tick: .
3. Click on *Apply*.

17.5.4 Email Notification

Email notification lets you notify different email accounts when different sorts of messages are waiting. This will override any settings you have in the Settings section, described in Section 17.5.1.



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

1. Click on *New Entry*:
2. Enter the email address.
3. Click on *Add*.
4. Check whether you want *All Faxes*, *Urgent Voicemail*, or *All Voicemail* sent to this address.
5. If there is a red cross on the screen:  click it so that it becomes a green tick: .
6. Click on *Apply*.

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

1. Click on the Trash Can icon to the right of the email address: .

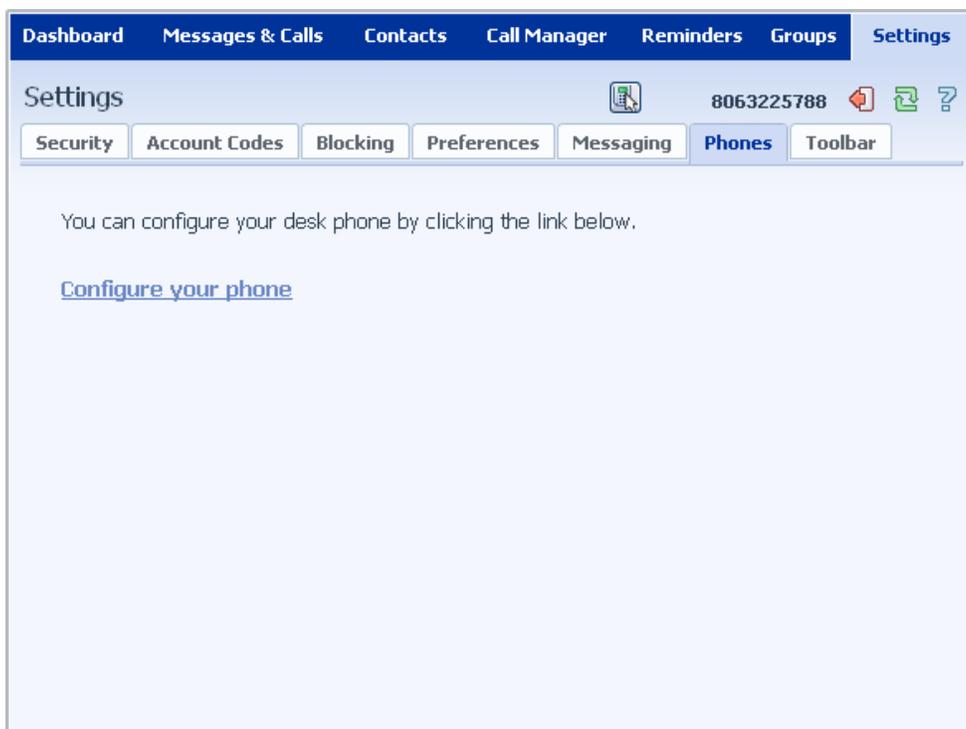
2. Click on *Apply*.

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

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

17.6 Phones

The Phones section allows you to modify your phone's settings, for example by adding speed dials.



To modify your phone's settings click on *Configure your phone*. This will launch a new browser window for the Phone Configurator. See Section 19 for instructions on using this.

17.7 Toolbar

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

The screenshot shows the TruConnect web interface. At the top is a navigation bar with tabs: Dashboard, Messages & Calls, Contacts, Call Manager, Reminders, Groups, and Settings. The Settings tab is active. Below the navigation bar, the page title is 'Settings'. To the right of the title is a phone number '8063225788' and three icons: a left-pointing arrow, a refresh icon, and a help icon. Below the title and phone number is a sub-navigation bar with tabs: Security, Account Codes, Blocking, Preferences, Messaging, Phones, and Toolbar. The 'Toolbar' tab is selected. The main content area contains the following text:

Your phone service allows you to access contacts, receive voicemail notifications and configure call services from a desktop toolbar.

Follow this link to [download the toolbar installer](#).

If prompted, select "Run" to immediately begin the installation or wait for the download to complete and then execute the installer manually at a later time.

To download and install the CommPortal Assistant toolbar, follow these steps:

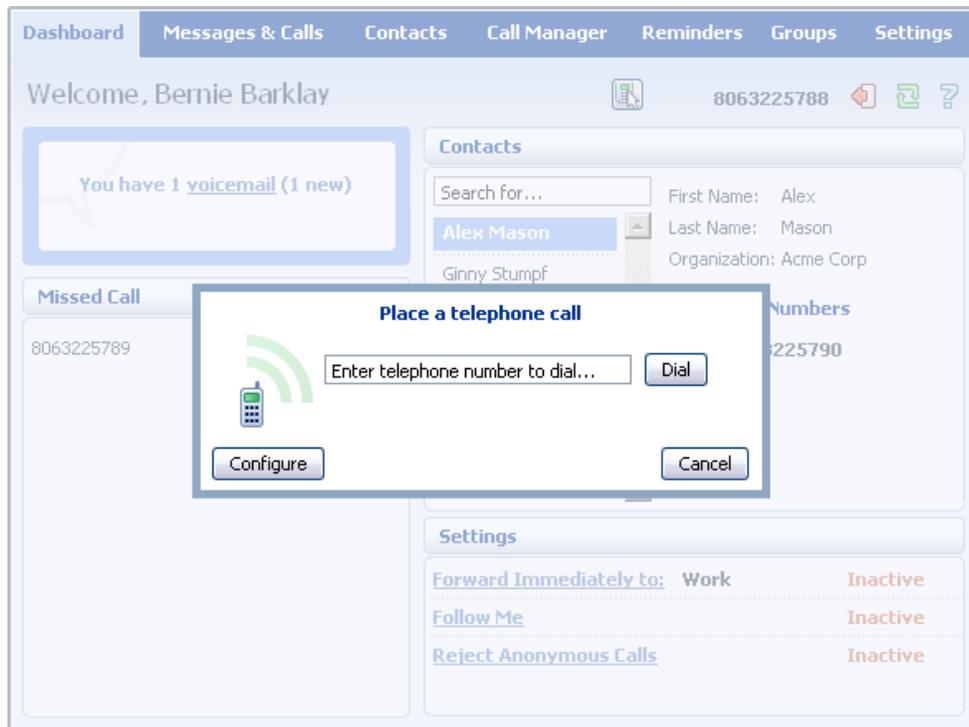
1. Click on the download the toolbar installer link.
2. If prompted, select *Run* to start the installation.
3. Follow the on-screen instructions to install CommPortal Assistant.

For instructions on using CommPortal Assistant, see the Help provided with it.

18 Click To Dial

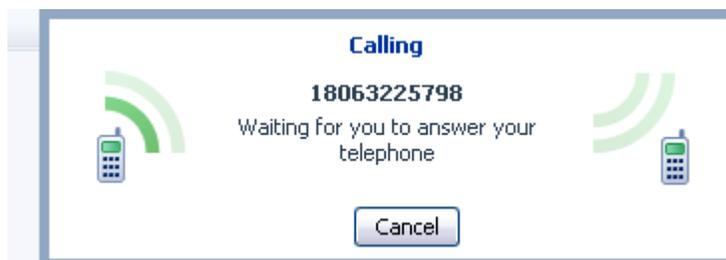
You can make a phone call from within CommPortal by clicking on the Click To Dial icon: 

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



18.1 Calling from your Regular Phone

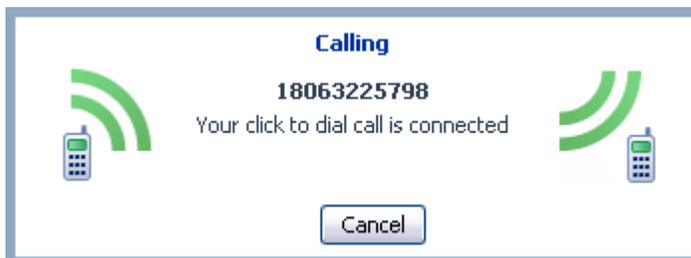
To make a call from your regular desk phone, enter the phone number you want to call in the space provided and click *Dial*. Your phone will now ring.



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



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



18.2 Calling from Another Number

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

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



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

The screenshot shows the 'Settings' page in a web application. At the top, there is a navigation bar with tabs: Dashboard, Messages & Calls, Contacts, Call Manager, Reminders, Groups, and Settings. Below this, the 'Settings' page is displayed with a sub-header 'Settings' and a phone number '8063225788'. There are several icons to the right of the phone number. Below the sub-header, there are tabs for 'Security', 'Account Codes', 'Blocking', 'Preferences', 'Messaging', and 'Phones'. The 'Preferences' tab is selected. Under 'Preferences', there are four main sections: 'Forwarding Preferences', 'Click To Dial', 'Line Information', and 'Voicemail Preferences'. 'Forwarding Preferences' has three checked options: 'Immediate Forwarding', 'Busy Forwarding', and 'No Answer Forwarding'. 'Click To Dial' has two radio buttons: 'Use my subscriber line' (unselected) and 'Use remote telephone' (selected). The 'Use remote telephone' option has a text input field containing '5555551111'. There is also an unchecked checkbox for 'Answer my telephone automatically when used to place click to dial calls'. 'Line Information' shows 'Line name: Bernie Bark...', 'Member of Department: None', and 'Admin for Department: Whole Busin...'. 'Voicemail Preferences' shows 'Incoming calls are forwarded to voicemail after 10 seconds'. At the bottom right, there are 'Apply' and 'Cancel' buttons.

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



You can now place a Click To Dial call. This will cause the number you entered as the remote telephone to ring. When you answer this phone your Click To Dial call will be set up.

19 Configuring Your Phone's Keys

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

1. Select the *Settings* page in CommPortal.
2. Select the *Phones* tab.
3. Click on the *Configure Your Phone* link.

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

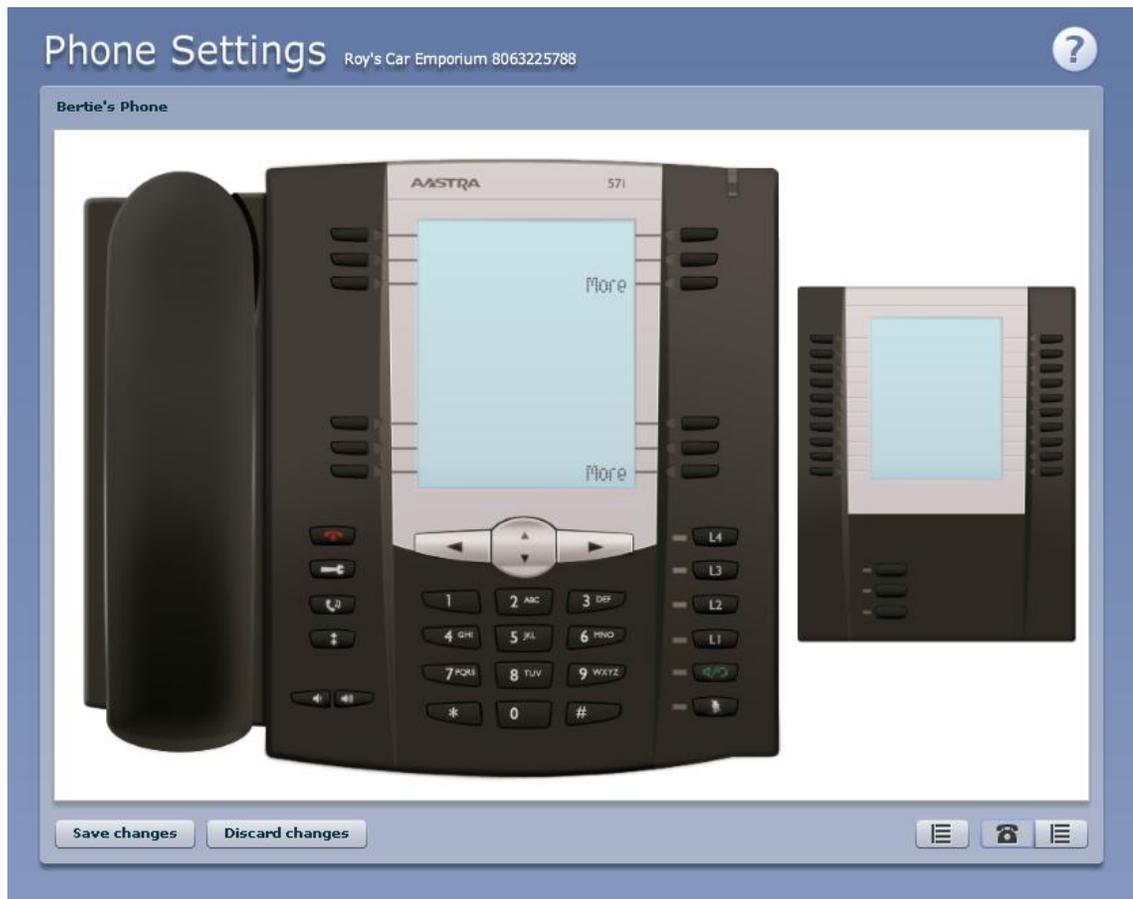
19.1 Using the Phone Configurator's Graphical View

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



The examples shown in this document show 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:



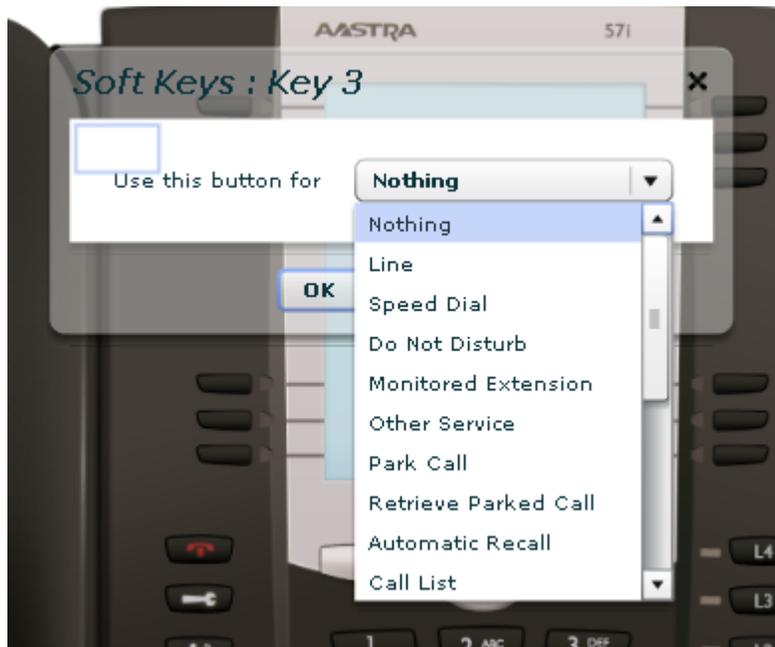
You can see whether you can modify a key by hovering your mouse over the key. If the key glows blue you can configure it. If it glows red, you cannot.



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



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



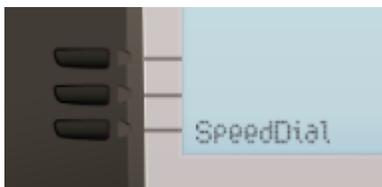
The possible options are as follows (although not all of these options may be enabled on your phone system):

- Nothing – this is used when a key is not assigned a function.
- Line – this key is used for your phone line. Pressing this key will cause the phone to go off-hook and ask you for digits to dial. When calls come into that phone line, this key can be used to answer those calls.
- Speed Dial – this configures the key as a speed dial as described in Section 8.1.
 - Enter the number you want this Speed Dial to call in the box provided.
- Do Not Disturb – configures the key as a Do Not Disturb key as described in Section 5.7. Note: Not supported on Polycom Phones
- Monitored Extension – allows you to monitor another line as described in Section 8.2.
 - Enter the number of the extension you want to monitor in the box provided.
- Other Service – this is reserved for future services.
- Park Call – this is used to park calls as described in Section 5.5.
- Retrieve Parked Call – this is used to retrieve parked calls as described in Section 5.6.
- Automatic Recall – this sets up the key as a speed dial to call the Automatic Recall access code.

- Call List – this configured the key to show you recent calls.
- Directory – this configures the key to provide you with the phone's list of contacts. Note: Aastra phones only.
- Intercom – this configures the key to launch a paging call as described in Section 8.3. Note: Not supported on Polycom phones.
- Services – this configures the key to provide to access to services configured on your phone. Note: Not supported on Polycom phones.
- Voicemail – this configures the key as a speed dial to access your Voicemail.
- Last Caller ID Erasure – this configures the key as a speed dial to call the access code which clears the network list of your recent calls.
- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.
- Trace Call – this configures the key as a speed dial to call the Call Trace service.
- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.
- Group Pickup – this configures the key as a speed dial for the Group Pickup service, described in Section 16.2.2.
- Directed Pickup – this configures the key as a speed dial to pickup calls ringing on a particular line.
 - Enter the number of the extension you want to pick up calls for in the box provided.

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

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



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.

19.1.1 Pages of Keys

Some phones, like the Aastra 5xi series, support a series of pages of keys, which you can scroll through using the *More* key. Note: Not supported on Polycom phones.

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



19.2 Table View

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



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

20 Access Codes

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

Immediate Call Forwarding Activation	*72 + number to forward to
Immediate Call Forwarding Deactivation	*73
Busy Call Forwarding Activation	*90
Busy Call Forwarding Deactivation	*91 + number to forward to
No Answer Call Forwarding Activation	*92
No Answer Call Forwarding Deactivation	*93 + number to forward to
Park Call	*53
Retrieve Parked Call	*54
Do Not Disturb Activation	*78
Do Not Disturb Deactivation	*79
Automatic Recall	*69
Group Call Pickup	*311
Voicemail	*318