

CommPortal User Training

ALL WEST COMMUNICATIONS





CommPortal

Welcome to Hosted PBX! This training is intended to get you up and running with the basic CommPortal features.

CommPortal is a web portal used to configure the features on your new ENHANCED phone system. With CommPortal you can:

- View missed calls
- Listen to voicemail messages
- Manage your contacts
- Set up rules to route your calls
- Perform many other functions

To get started, go to the login page at: <u>https://commportal.allwest.com/commportal</u>. (Default password is provided at install. Each user (seat) will be given a password. Once you log in, you will be prompted to create a new password.)



Main Screen

When you log in, you will see the **Home** screen:



- Home Quick view of most common functions
- Messages View new and deleted messages
- **Contacts** Store and retrieve contacts
- Make Call Type in phone number and the call will connect to your desk phone for completion
- Your Services
 - Call Settings
 - Message Settings
 - Notifications
 - Account Codes
- **Personal Details** You and your devices
- Security Change password and PINS
- Support Helpful tips



Messages

Home	Messages Contacts			Make Call
	Messages (3 New)	Deleted		0
	New Voicemail			
	UINTA COUNTY, H - (307) 789 6560		Thu 12/12, 4:22 pm, 34 secs	Actions V
	LLOYD MULLEN - 1007) 075 0005		Wed 12/11, 1:24 pm, 23 secs	Reply
	Brenda Van Cott - (105) - 1044		Tue 12/10, 1:35 pm, 10 secs	Mark as heard
	HOLIDAY INN - (307) 382 9200		Mon 12/9, 1:14 pm, 22 secs	Forward as Email
	DANIEL GREN - (000) - 500 CIGE		Thu 12/5, 2:23 pm, 50 secs	Forward as Voicemail

The Messages tab displays all new and deleted calls as well as a Settings tab.

- To listen to your message, click on the arrow next to the name and click the **Play** arrow button on the pop-up audio controller. (You can listen to new or previously listened to messages.)
- Actions allows you to Reply, Mark as Heard, Forward as Email or Voicemail.



Messages



Clicking on any name brings up a pop-up that allows you to call the person from your phone.



Messages – Delete

Home	Messages Contacts			Make Call Suzann
	Messages (3 New)	Deleted		۵
	New Voicemail			Delete All
	UINTA COUNTY, H - (307) 789 6560	Tł	nu 12/12, 4:22 pm, 34 secs	Actions V X

To delete messages in the **Messages** tab:

- One Message: Click the "x" on the far right of the line
- All Messages: Click the **Delete All** button at the top



Messages – Delete

Home	Messages Contacts			Make Call Suzanne
	Messages (3 New)	Deleted		ö
				Permanently Delete All
	UINTA COUNTY, H - (307) 789 6560		Fri 12/13, 11:18 am, 28	Restore
			secs	Delete Permanently

If you have accidently deleted the message, go to the **Deleted** tab and click on **Restore**.

You can also choose **Delete Permanently** or **Permanently Delete All.** These actions are not reversible.



Messages – Forwarding (as Email)

	Mess	sages (3 New)	Deleted		0
	New Voicemail UINTA COU	Contraction of the second s	mail Forwarding		Actions V
_	LLOYD MU	To:	<enter destination(s)=""></enter>		Actions ▼Actions ▼
	Actions ▼	Cc:	<enter destination(s)=""></enter>		 Actions Actions
Reply		N - (3 Subject	FW: Voicemail from HOLIDAY INN (3	807) 382 9200	Actions v
Mark a	as heard	1EAL1 @ me	essage.wav		Actions ▼
Forwa	rd as Email	OF -			Actions V
Forwa	rd as Voicemail	- (43:			Actions v
	All West Co	- (43:			Actions v
	All West CS			Send Cano	Actions V
		ASSMAN - (007)	369-0554	110.5/20, 11.10 dill, 47 Secs	Actions V

- Under Actions, choose Forward as Email
- Use the dropdown function to choose a contact in your contact list or enter in an email address
- You can change the subject line if you wish
- And add a message in the box
- Click Send



Messages – Forwarding (as Voicemail)

ages (3 New)	Deleted	
		Actions V
	Forward as Voicemail	Reply
NTY, H - (307)		Mark as heard
LLEN - (307) 2	T	Forward as Email
Cott - (435) 78		
IN - (307) 382 9	Urgent Private	Forward as Voicemail
EN - (385) 333	 Record Introduction 	
HEALT - (307)		
R - (435) 783 4	Loading 00:00 / 00:00	
S OF - (435) 33		
R - (435) 783 4	Original Voicemail	
R - (435) 783 4		
R - (435) 783 4		
NUT CO - (801	Send C	ancel
SSMAN - (307)	Thu 9/26 11:18 am 47	secs IE

- Under Actions, choose Forward as Voicemail
- Use the dropdown function to choose a contact in your contact list or enter a phone number
- You can mark the message **Urgent** or **Private**
- You can add an introduction via **Record Introduction**
- Click Send



Home	Messages Contacts		Make Call Suzanne
	Contact List	Extensions	Short Codes
	New Contact New Group Import Export All		
	Contacts and Groups	You have 4 Contacts and 0 Groups.	
	Search for	 Select a contact or group to view or edition Search for a specific item using the search for a specific item using the search for a specific item using the search specific item using the specific item	
	 Day, Ryan Howe, Cody 	 Select multiple contacts or groups usin 	g Ctrl-click and Shift-click shortcuts.

The **Contacts** tab enables you to manage all of your contact information. You can:

- Create **New Contacts** (using recent call information or creating a new one)
- Create New Groups
- Import or Export contacts



Contacts – Importing

		Extensions	Short C
New Gr	Import Contact	3	
	Select the file to im press Import.	port contacts from and the action to take when the contact exists t	then
ly	CSV File:	Choose File No file chosen	-Circ
Eric Iobal	Action when contac	t exists: Overwrite the contact Duplicate the contact Ignore imported entry	
	Import status		_
	added: 0 upda	ed: 0 deleted: 0 ignored: 0	_
	Note: You currently entries will be ignor	have 4 contacts. If you reach 1000 during the import, any remaini ed.	ing
		Import	ancel
	_		_

The **fastest way to add contacts** is to import them from your email program. For Microsoft Outlook, follow these instructions:

- Open Outlook and go to the File tab, then Open & Export > Import/Export
- 2) In the new window, select **Export to a File > Next**
- 3) Select **Comma Separated Values** from the list > **Next**
- 4) Select **Contacts** from the folder tree > **Next**
- 5) Click **Browse** to save file > **Next** > **Finish**
- 6) Go back to the CommPortal **Contacts** tab > **Import**
- Click Choose File button and add the file you just saved
- 8) Choose Overwrite, Duplicate or Ignore
- 9) Click Import

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Contacts – Single Contact

		Make Call Suzanne S		
Messages Contacts	Extensions	Short Codes		
Contact List		Save Cancel		
New Contact New Group Import Expo	ort All			
Contacts and Groups	First Name			
	Last Name	Contact List	Extensions	Short Codes
Search for	Nickname	New Contact New Group Import Export A	1	Edit Delete
	Job Title	Contacts and Groups	Testerson, Testy (Tes)	
	Organization	Search for		
New Contact:	Home 🏫	Day, Ryan Howe, Cody		
1) Click New Contact		Support Clobal		
2) Enter information i	n pop-up	✓ Testerson, Testy		

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- 3) Click Save (This new contact will appear under your Contacts and Groups listing
- 4) To Edit or Delete contacts, choose the name(s)—through Search or the listing
- 5) Choose the needed action



Contacts – Group Contact

New Group:

- 1) Click on New Group
- 2) Enter Group Name and Telephone ID (if desired)
- 3) Choose Group Members through Search for . . . Function or choose from the list
- 4) Click Save (Your group will now show up under Contacts and Groups)
- 5) To Edit or Delete groups, choose the name(s)—through the Search for function or the listing
- 6) Choose the needed action



Contacts – Extensions

The **Extensions** tab under **Contacts** allows you to quickly dial other

numbers in the Business Group.

The table shows all the lines in the Business Group and the extensions that are currently in operation.

You can click on the telephone number or extension and have your computer dial the number for you!

lessages	Contacts			Make Call	
	Contact List	Extensions	Sho	ort 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.					
Nam	le	Department	Telephone Number	Extension	
Aaro	n Huffaker	None	(435)	8913	
Alish	na Lewis	Finance Bldg.	(435)	4925	
Amy	Miles	None	(435) 700-1000	4992	



Contacts – Short Codes

Messages	Contacts		Make Ca		
	Contact List	Extensions	Short Codes		
Short codes a	Short codes allow you to quickly dial common numbers. The table below shows the short codes currently in operation.				
There are no s	hort codes in the Business Gro	up.			

The Short Codes tab under Contacts shows all the speed dials available within your Business Group.

These **Short Codes** are set up by your administrator.



Call Manager / Phone Status (General Settings)

On the **Home** page:

- Click the dropdown on the green button to choose: Available for Calls to Do Not Disturb, sending calls directly to voicemail if you're busy.
- Click the dropdown on the **blue button** to choose how incoming calls are handle
- Choose the call actions if you're busy or away from your phone
- Click **Apply** in top right



Call Manager / Phone Status (Advanced Settings: Forward Selected)

Apply Cancel	Selective Call Forwarding Screening List	Select Forwarding Number
	Forward calls from the following numbers	Use a saved number:
Advanced Settings	List Contacts Extensions	Number Name Add m
Forward Selected Callers from the forwarding list will be forwarded to another phone Image: Forward if Unavailable If your phone is unavailable calls will be	Add New 15	Add your frequently used forwarding numbers to this list. The saved numbers can be accessed from all the forwarding settings in the Call Manager. • Or use a temporary number:
forwarded to <u>another phone</u>	Clear List OK Cancel	ОК Cancel

On the **Home** page:

- To automatically forward a group of callers to another number use the **Forward Selected** feature
- Click the **Forwarding List** link to create the contact list > click **OK**
- Click the Another Phone link to designate where the callers will be routed to
- Click OK > Apply





Call Manager / Phone Status (Advanced Settings: Forward if Unavailable)

Apply Cancel	Select Forwarding Number		
Advanced Settings	Use a saved number: Number Name Add		
Example 2 Forward Selected Callers from the <u>forwarding list</u> will be forwarded to <u>another phone</u>	Add your frequently used forwarding numbers to this list. The saved numbers can be accessed from all the forwarding settings in the Call Manager.		
Forward if Unavailable If your phone is unavailable calls will be forwarded to <u>another phone</u>	Or use a temporary number: OK Cancel		

On the **Home** page:

- To automatically forward all callers to another number use the Forward if Unavailable feature
- Click the Another Phone link to designate where the callers will be routed to
- Click **OK** > **Apply**



CommPortal — Getting Oriented Settings* – Account Call Settings General To change your password and/or PIN, • The call transfer number is set to (435) 783 4361 Provide caller ID for incoming calls click the links under **Security** options Provide caller name for incoming calls at the bottom of the **Home** page Call Forwarding Ask me for a forwarding number each time I turn on forwarding from my phone using an access code Use the Call Settings link for: • Immediate Forwarding General: Allows you to choose what Busy Forwarding • No Answer Forwarding Your Services you want displayed when you receive a call **Call Forwarding:** Allows you to ဝပ် • choose when you want to be Call Settings prompted for a call forwarding Message number **Personal Details** Security Change Password *Settings changed on the physical phone **Devices** Change Call Services PIN Change Voicemail PIN will override settings made via this CommPortal web application. www.allwest.com 12/2019

Settings – Messages

- Message Settings are found under Your Services at the bottom of the Home page
- The General section allows you to receive voicemail notifications as an email > Click the add an email address to add the desired email
- The Mailbox Access section allows you to manage mailbox settings and customize how you are notified of a voicemail:
 - Details and Message
 - Message only
 - Details only



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Settings – Messages

- Message Settings are found under Your Services at the bottom of the Home page
- The **Voicemail Greeting** section allows you to choose greeting type from dropdown:
 - Personal*
 - System with name*
 - System with number
 - System
- To record your name or a personal greeting, click the Edit button. Record your greeting, click Download Greeting and Save
- You can also upload a previously recorded greeting via the Upload Greeting option.
 Choose File > Upload > Save

our General Forward messages as emails Forward to: add an email address Leave original in Inbox

Mailbox Access

- Skip PIN
- Fast Login
- Auto-play voicemail

Voicemail playback Details and Message •

Voicemail Greeting
 Use the greeting: Personal *
 more options
 Use a different greeting when I'm in a call. record

Personal

Loading

Record/Listen Greeting

Download Greeting

Upload Greeting

Personal

Record/Listen Greeting

New file: Choose File No file chosen

Current file: No file currently uploaded

Upload

Upload Greeting

files that you upload.

00:00 / 00:00

00 1 0

You are responsible for ensuring that you have all necessary rights to the

0

Use different greeting within my business group. record

*A computer microphone is required for the "Personal" and "System with name" options.



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Settings – Notifications

Call Settings	Message Settings	Notifications	Account Codes					New Entry	
Not	ifications		Clear Li	st New Entry		Apply Ca	incel	Phone Number:	
Message Waiting Indicator									
Send phone notification of incoming messages to the following phone numbers							Add Concol		
Phon	e Number			Urgent Voicemail	All Voicemail				Add Cancel
	783 4974	honon	umbors b				×		- f i il
	-		umbers b	-	ΥΟΙ	i can a	iso sp	ecify which type	e of voicemail

- Clicking on the "x" of a listed number or
- Clicking on **Clear List** to remove **all** listed numbers You can *add* phone numbers by:
- Clicking on New Entry and
- Typing in the phone number and clicking Add

You can also specify which type of voicemail you want to be notified of–**Urgent or All**– by clicking the appropriate box and clicking **Apply.**



Apps – Computer

You can also download the CommPortal Assistant to your computer*—which allows you to make calls from your desktop taskbar Enter number to call ~ Call and see details on incoming calls.

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- Under **Support** (at the bottom of your portal), click **Downloads**
- On the pop-up, click View Apps
- Click **Computer > Assistant**
- Click Vista / Windows 7 / Windows 8 / Windows 10 link to download the software to your computer (You may need your IT admin to complete the process.)







Settings – Account Codes

Account Codes are set by your administrator.

These are optional authentication or authorization codes required before dialing certain types calls.

Call Settings	Message Settings	ations Account Codes				
А	ccount Codes		Edit Personal Account	Codes		
		umbers require a code before d	ialing.			
A	ccount Code Options	•	-	Personal	Business Group	
	II types requiring an account Local	code Operator		You have	no personal account code	s assigned.
	Regional	Directory				
	National	Carrier Dialed				
4	International	Local Business	Group			
	Premium Rate	Other Business	Group			
4	Use validated account code	s				
Ac	count code length: 5					
Ma	ax incorrect attempts before a	account is blocked: 10				
					OH	



Devices – Setting Soft Key

	Manage	your	phones
--	--------	------	--------

Personal Details		✓Programmable Keys - Right		_
		✓Key 1		
Devices		Soft key action	None	T
	5 5 5 <u>0 7</u> 2 5 5 <u>0 7</u>	>Key 2		
Desk Phone (435) 783 4974 set keys	000 21	> Key 3		
		>Programmable Keys - Main		
	Cisco SPA 504G	>User		
		>Advanced		
		>Paging Groups		
	Edit			
		_		

- Under Personal Details, click the Devices link
- Click the **Set Keys** link to access your phone's features
- A Manage your phones pop-up will appear > Click Edit
- You will see a host of options to program your soft keys, user preferences and advanced settings



CommPortal— Getting Help

There are several **Support** options at the bottom of the portal.

- Click Help to get information on the various features and settings
- Click **Download** to get CommPortal's desktop calling feature (Discussed in a previous slide)
- Click **Send Feedback** to report issues or provide functional suggestions

