



CommPortal User Training

ALL WEST COMMUNICATIONS



12/2019



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

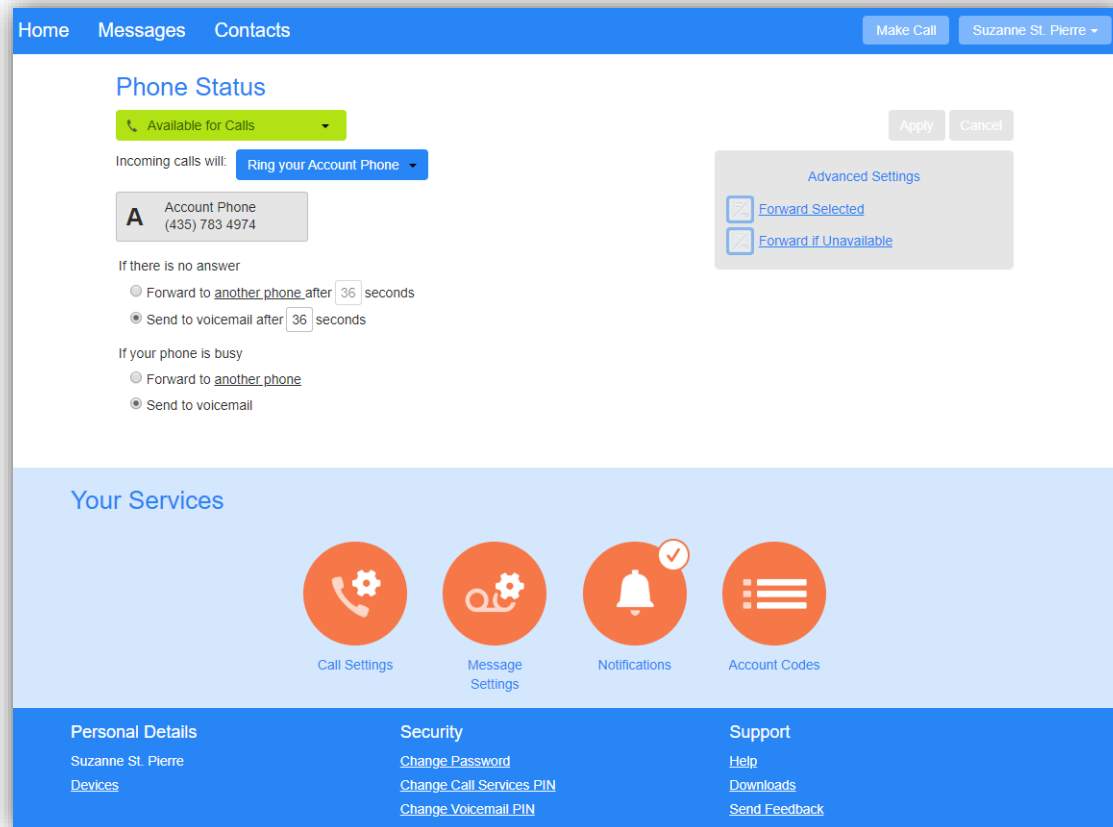
To get started, go to the login page at: <https://commportal.allwest.com/commportal>.
(Default password is provided at install. Each user (seat) will be given a password.
Once you log in, you will be prompted to create a new password.)



CommPortal— Getting Oriented

Main Screen

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

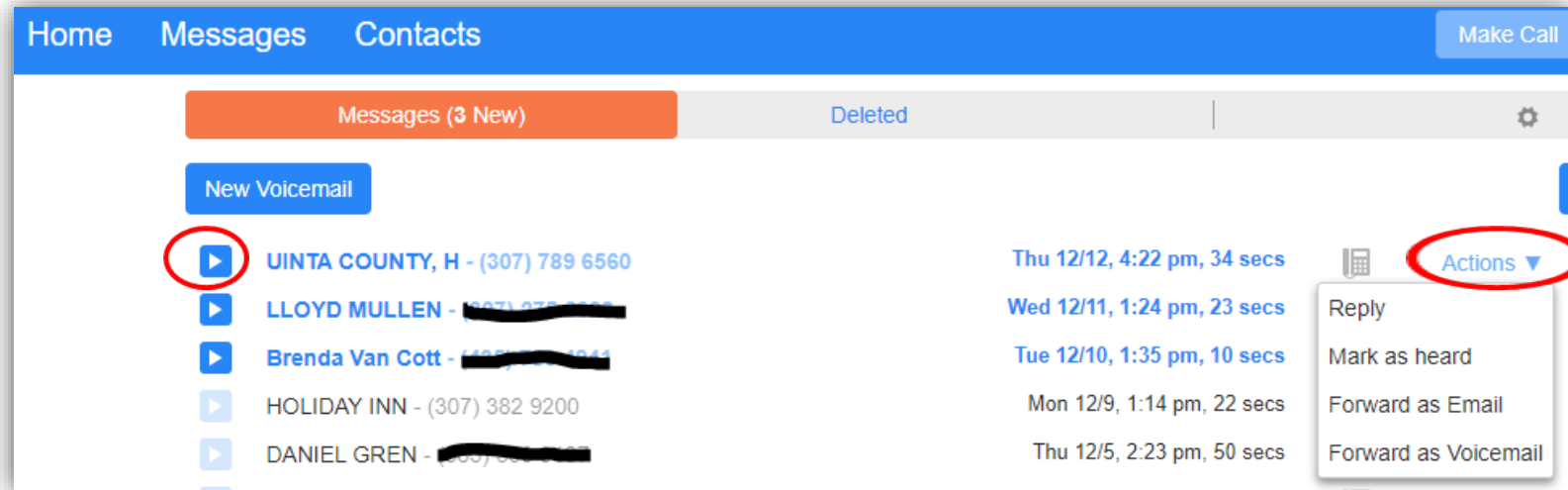


- **Home** – Quick view of most common functions
- **Messages** – View new and deleted messages
- **Contacts** – Store and retrieve contacts
- **Make Call** – Type in phone number and the call will connect to your desk phone for completion
- **Your Services**
 - Call Settings
 - Message Settings
 - Notifications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



CommPortal— Getting Oriented

Messages

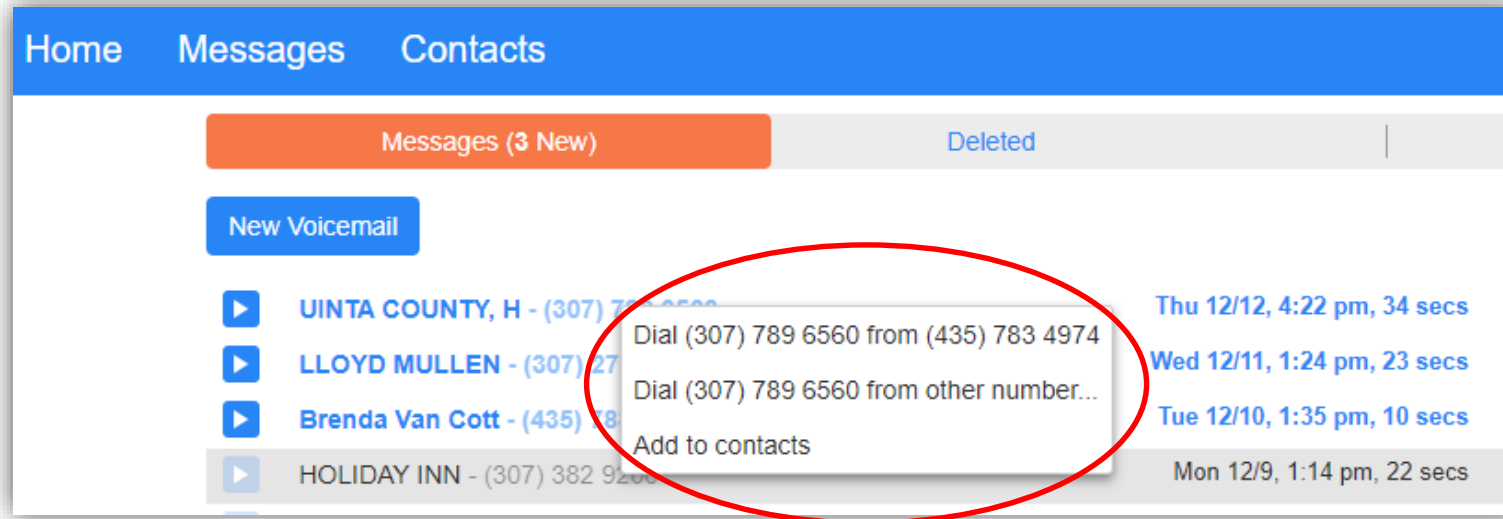


The **Messages** tab displays all new and deleted calls as well as a **Settings** tab.

- 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.

CommPortal— Getting Oriented

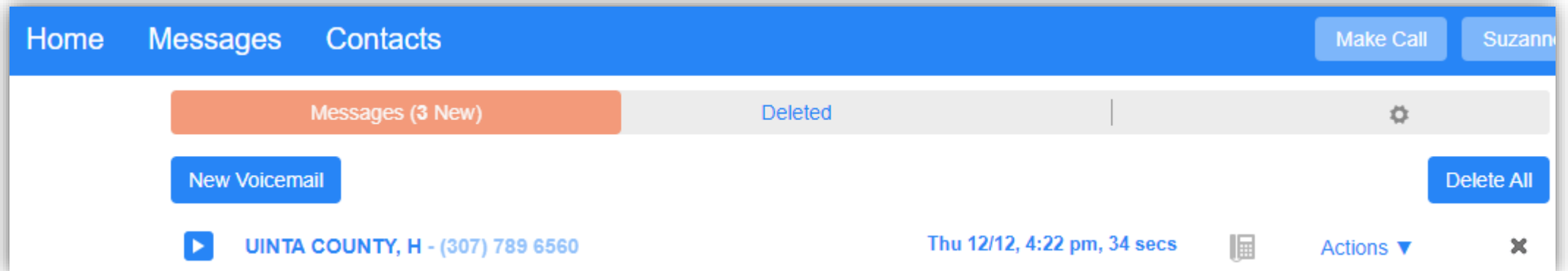
Messages



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

CommPortal— Getting Oriented

Messages – Delete

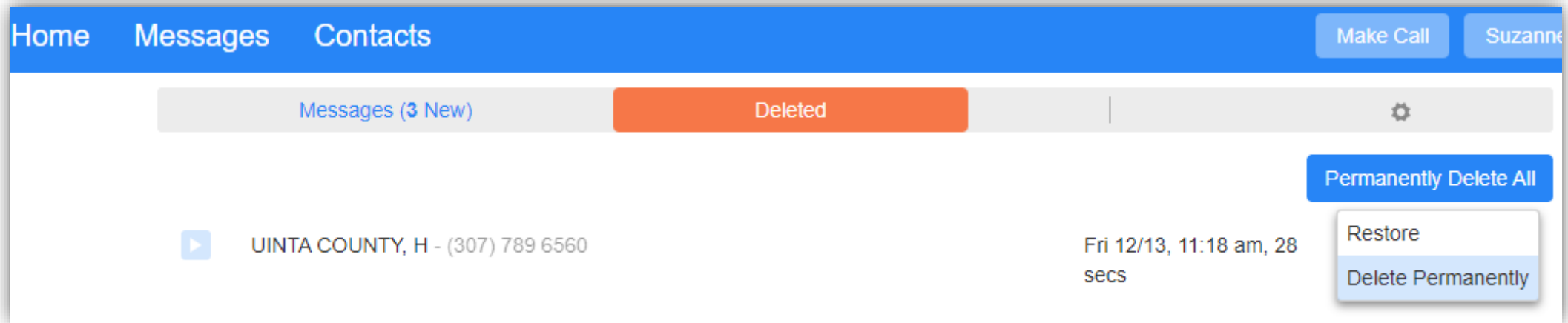


To delete messages in the **Messages** tab:

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

CommPortal— Getting Oriented

Messages – Delete

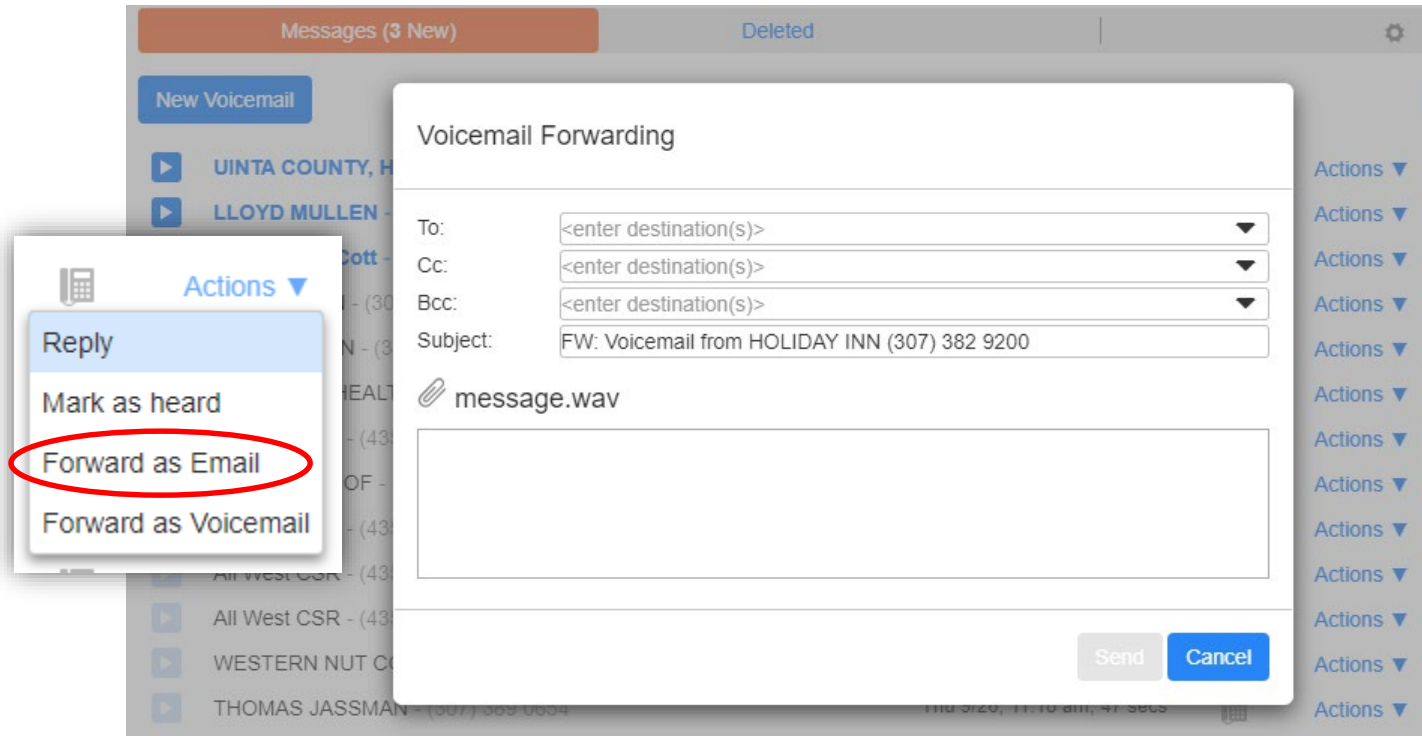


If you have accidentally deleted the message, go to the **Deleted** tab and click on **Restore**.

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

CommPortal— Getting Oriented

Messages – Forwarding (as Email)

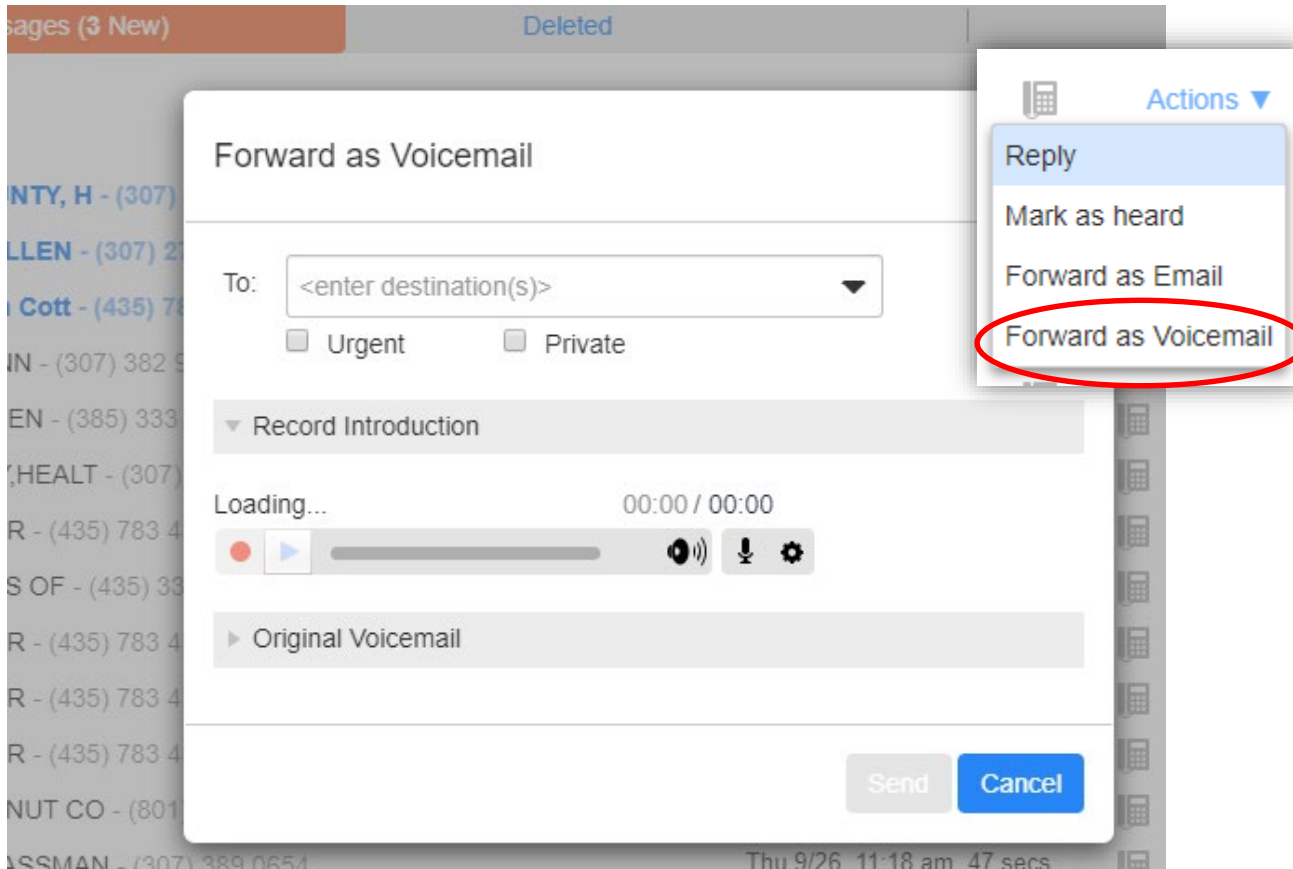


- Under **Actions**, choose **Forward as Email**
- Use the dropdown function to choose a contact in your contact list or enter in an email address
- You can change the subject line if you wish
- And add a message in the box
- Click **Send**



CommPortal— Getting Oriented

Messages – Forwarding (as Voicemail)

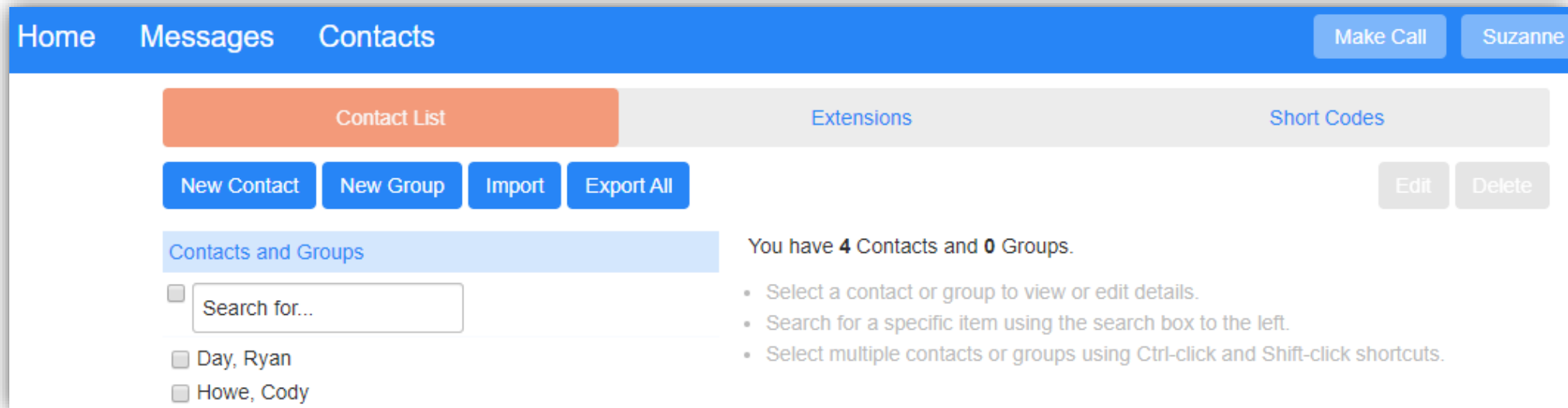


- Under **Actions**, choose **Forward as Voicemail**
- Use the dropdown function to choose a contact in your contact list or enter a phone number
- You can mark the message **Urgent** or **Private**
- You can add an introduction via **Record Introduction**
- Click **Send**



CommPortal— Getting Oriented

Contacts Tab

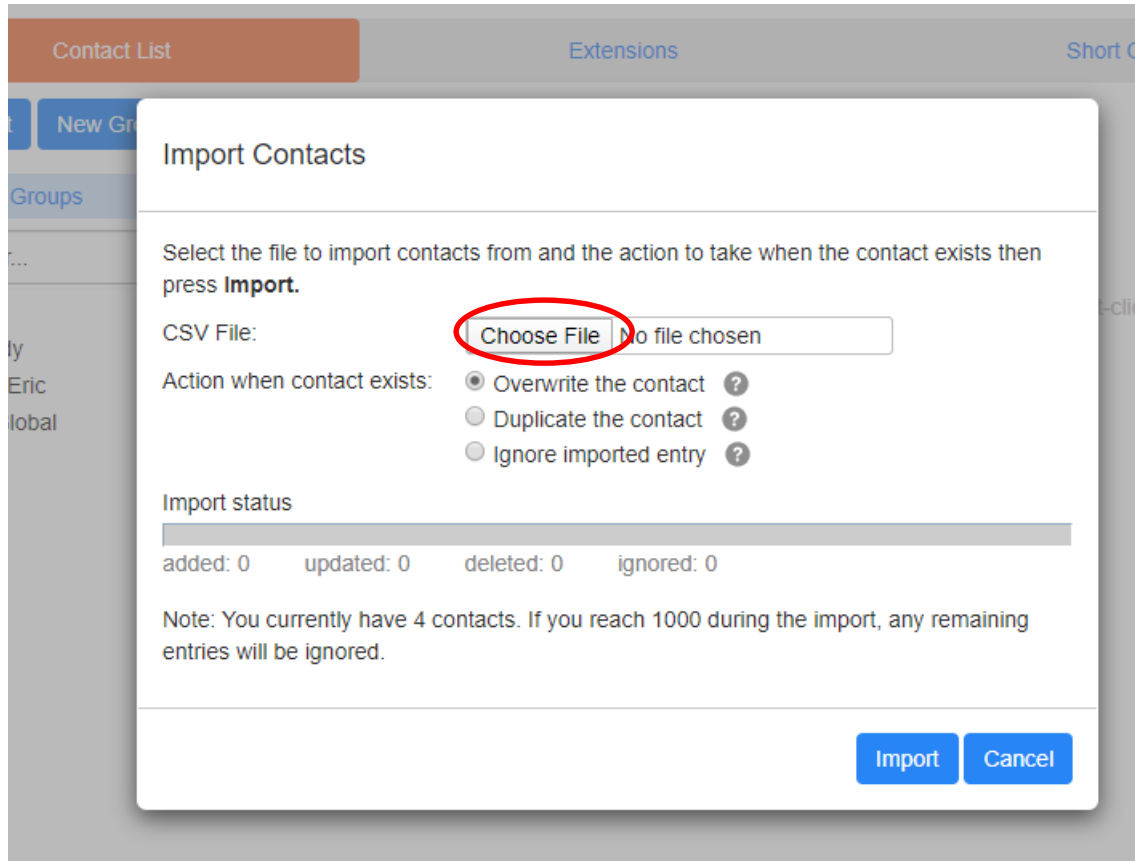


The **Contacts** tab enables you to manage all of your contact information. You can:

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

CommPortal— Getting Oriented

Contacts – Importing



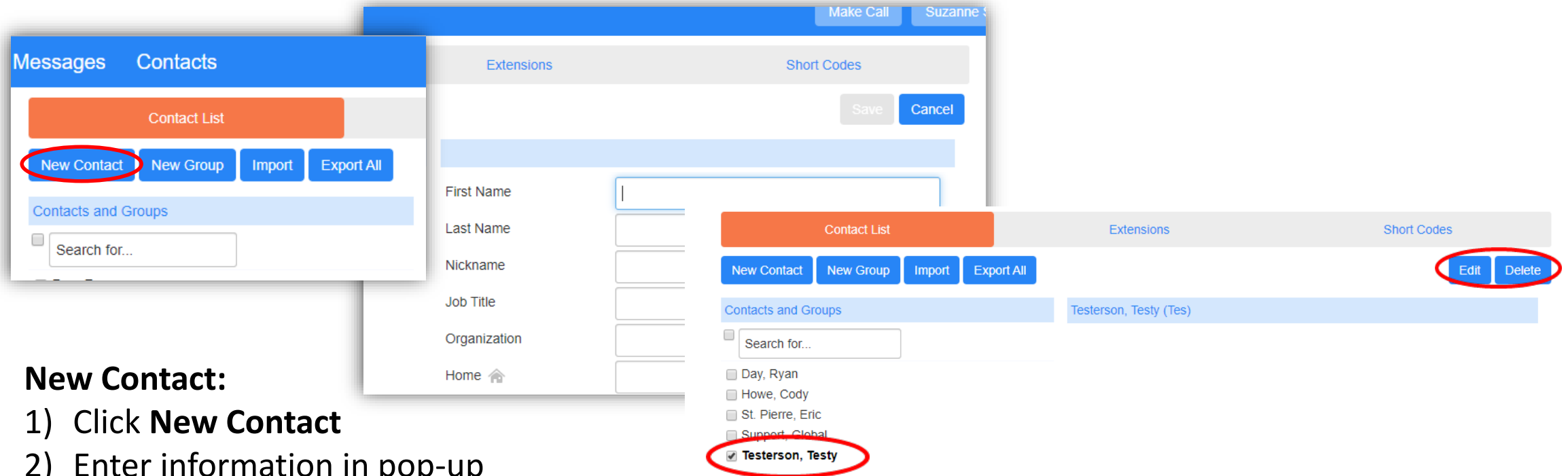
The **fastest way to add contacts** is to import them from your email program. For Microsoft Outlook, follow these instructions:

- 1) 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**
- 7) Click **Choose File** button and add the file you just saved
- 8) Choose **Overwrite, Duplicate or Ignore**
- 9) Click **Import**



CommPortal— Getting Oriented

Contacts – Single Contact



New Contact:

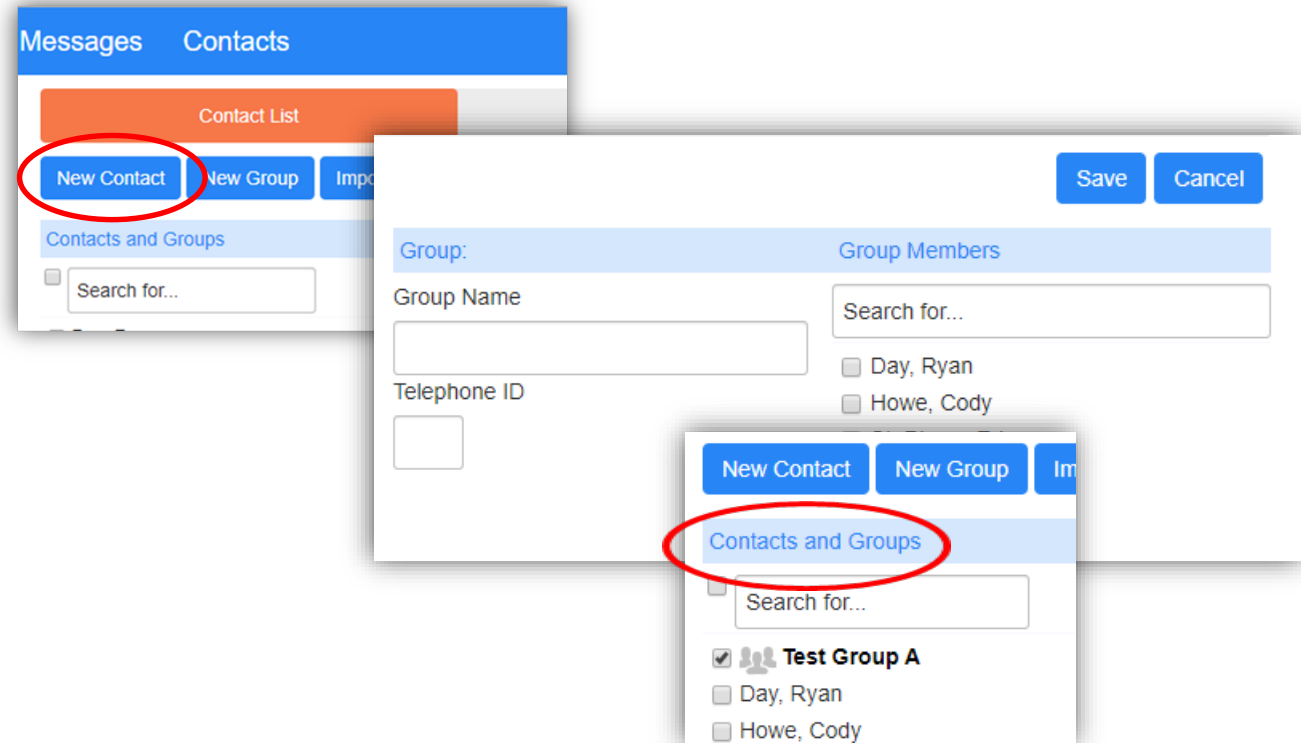
- 1) Click **New Contact**
- 2) Enter information in pop-up
- 3) Click **Save** (This new contact will appear under your **Contacts and Groups** listing)
- 4) To **Edit** or **Delete** contacts, choose the name(s)—through Search or the listing
- 5) Choose the needed action

CommPortal— Getting Oriented

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



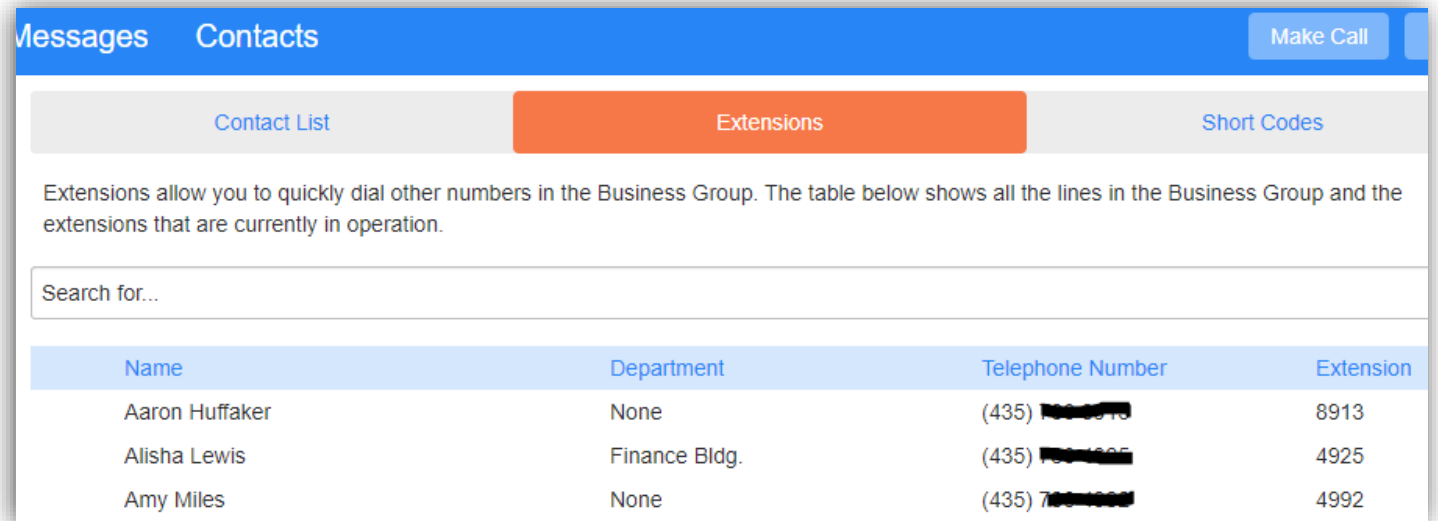
CommPortal— Getting Oriented

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!

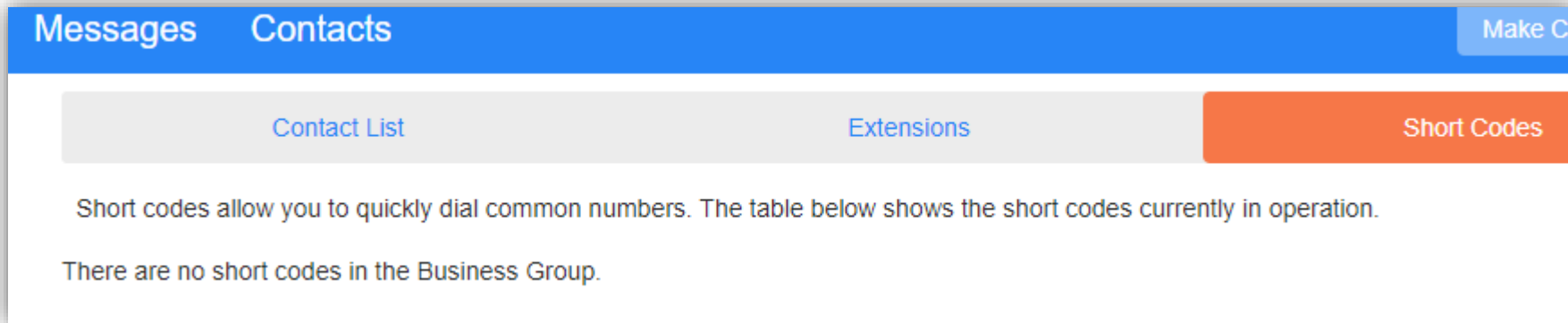


The screenshot shows the CommPortal interface. At the top, there are tabs for 'Messages' and 'Contacts'. The 'Contacts' tab is active, and within it, the 'Extensions' sub-tab is selected. A 'Make Call' button is visible in the top right corner. Below the tabs, a text box explains that extensions allow quick dialing of numbers in the Business Group. A search bar is provided. Below the search bar is a table with four columns: Name, Department, Telephone Number, and Extension. The table lists three contacts: Aaron Huffaker, Alisha Lewis, and Amy Miles.

Name	Department	Telephone Number	Extension
Aaron Huffaker	None	(435) 700-0000	8913
Alisha Lewis	Finance Bldg.	(435) 700-0000	4925
Amy Miles	None	(435) 700-0000	4992

CommPortal— Getting Oriented

Contacts – Short Codes



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

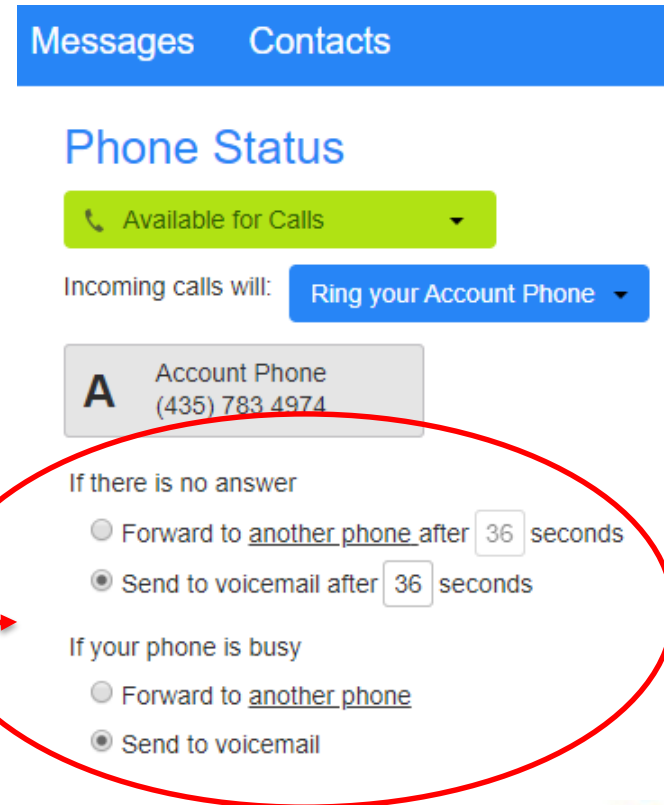
These **Short Codes** are set up by your administrator.

CommPortal— Getting Oriented

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



Messages Contacts

Phone Status

 Available for Calls ▾

Incoming calls will: **Ring your Account Phone** ▾

A Account Phone
(435) 783 4974

If there is no answer

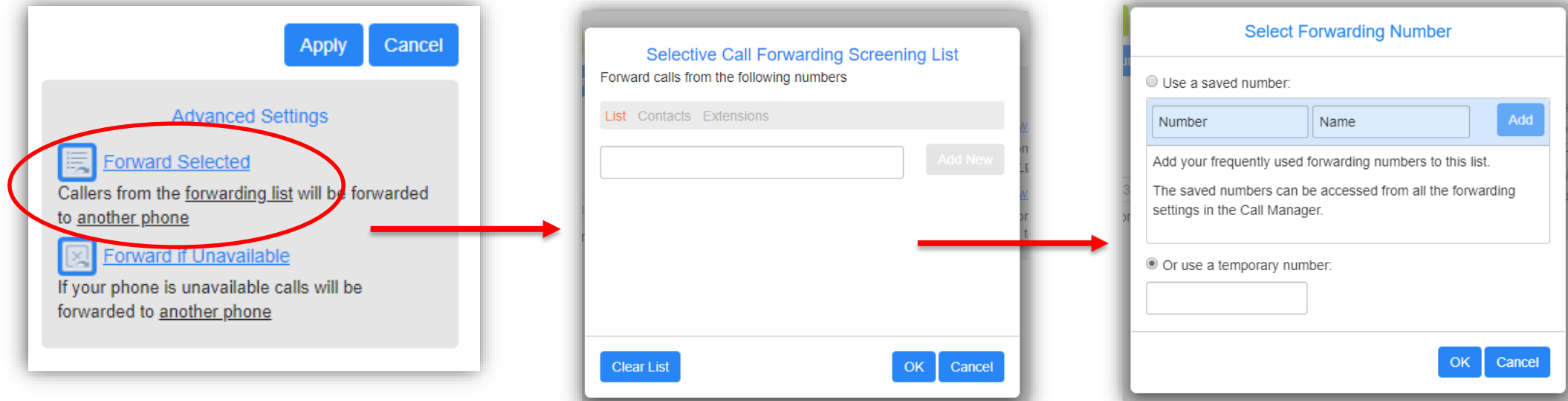
- ☐ Forward to another phone after 36 seconds
- ☒ Send to voicemail after 36 seconds

If your phone is busy

- ☐ Forward to another phone
- ☒ Send to voicemail

CommPortal— Getting Oriented

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

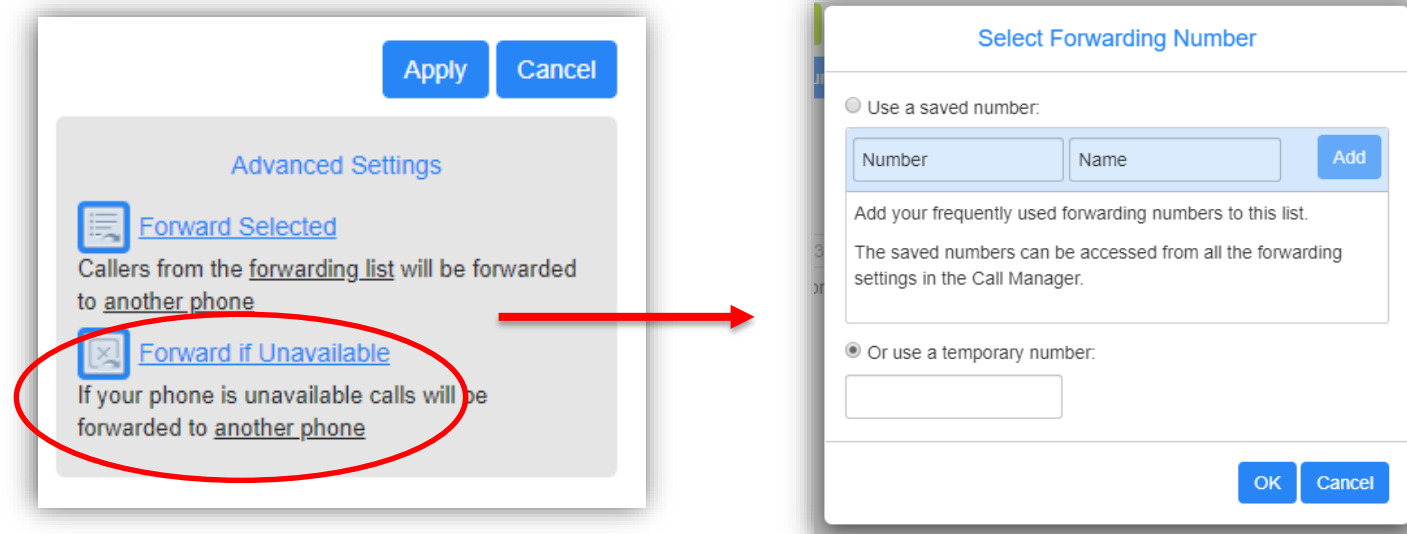


On the **Home** page:

- 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**

CommPortal— Getting Oriented

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



On the **Home** page:

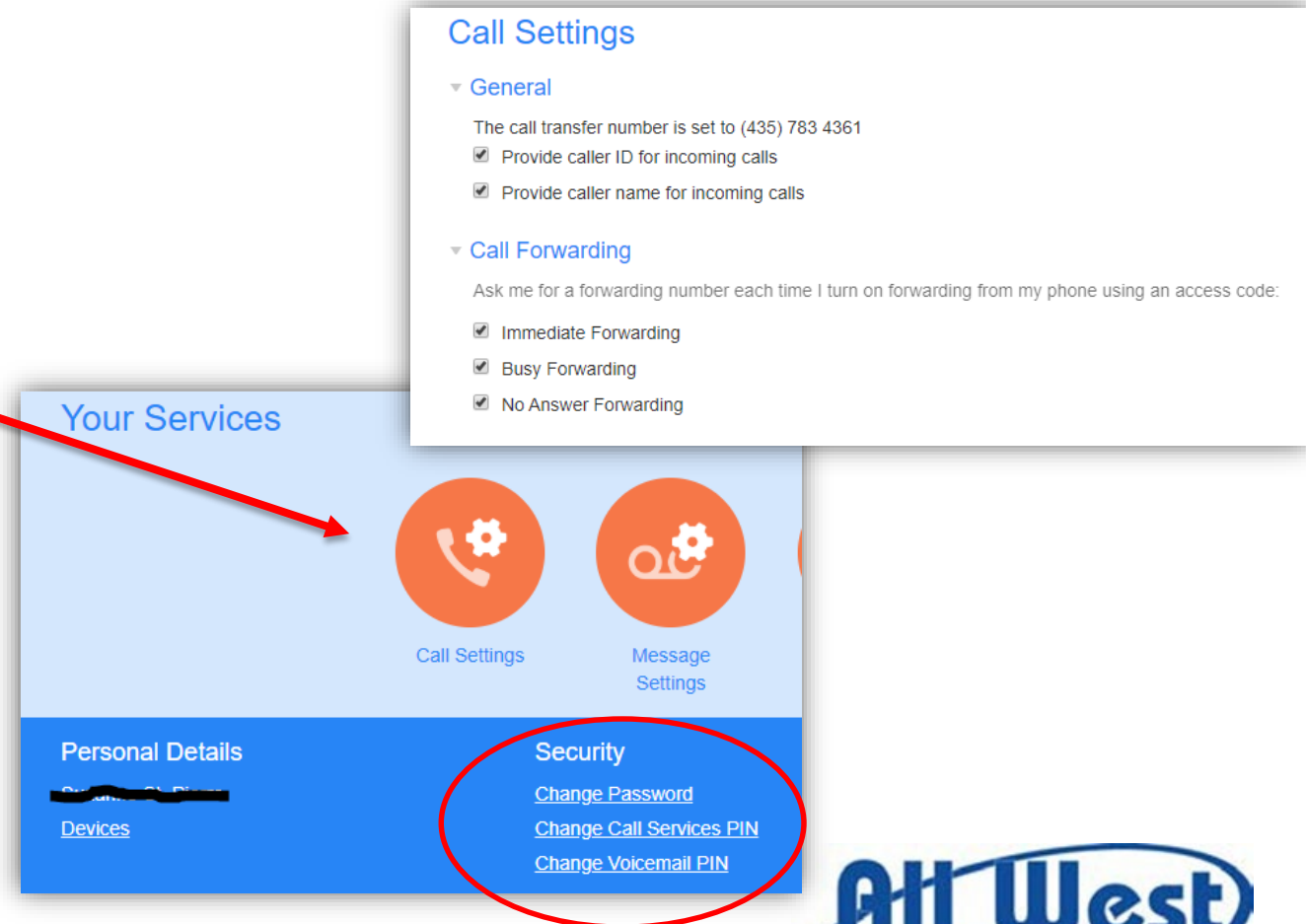
- To automatically forward all callers to another number use the **Forward if Unavailable** feature
- Click the **Another Phone** link to designate where the callers will be routed to
- Click **OK** > **Apply**

CommPortal— Getting Oriented

Settings* – Account

- To **change your password and/or PIN**, click the links under **Security** options at the bottom of the **Home** page
- Use the **Call Settings** link for:
 - **General:** Allows you to choose what you want displayed when you receive a call
 - **Call Forwarding:** Allows you to choose when you want to be prompted for a call forwarding number

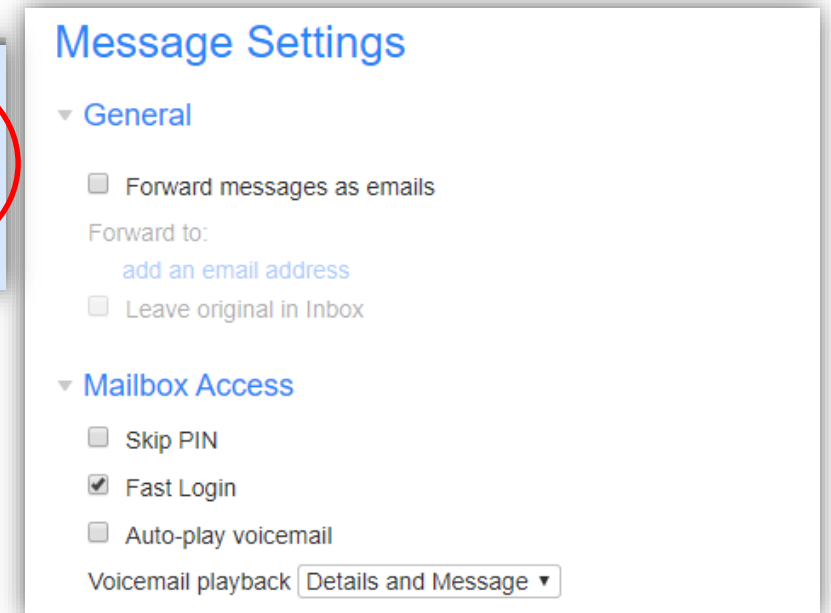
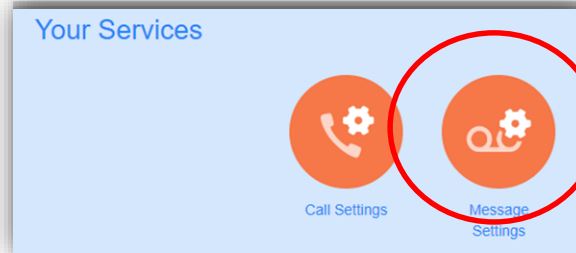
**Settings changed on the physical phone will override settings made via this CommPortal web application.*



CommPortal— Getting Oriented

Settings – Messages

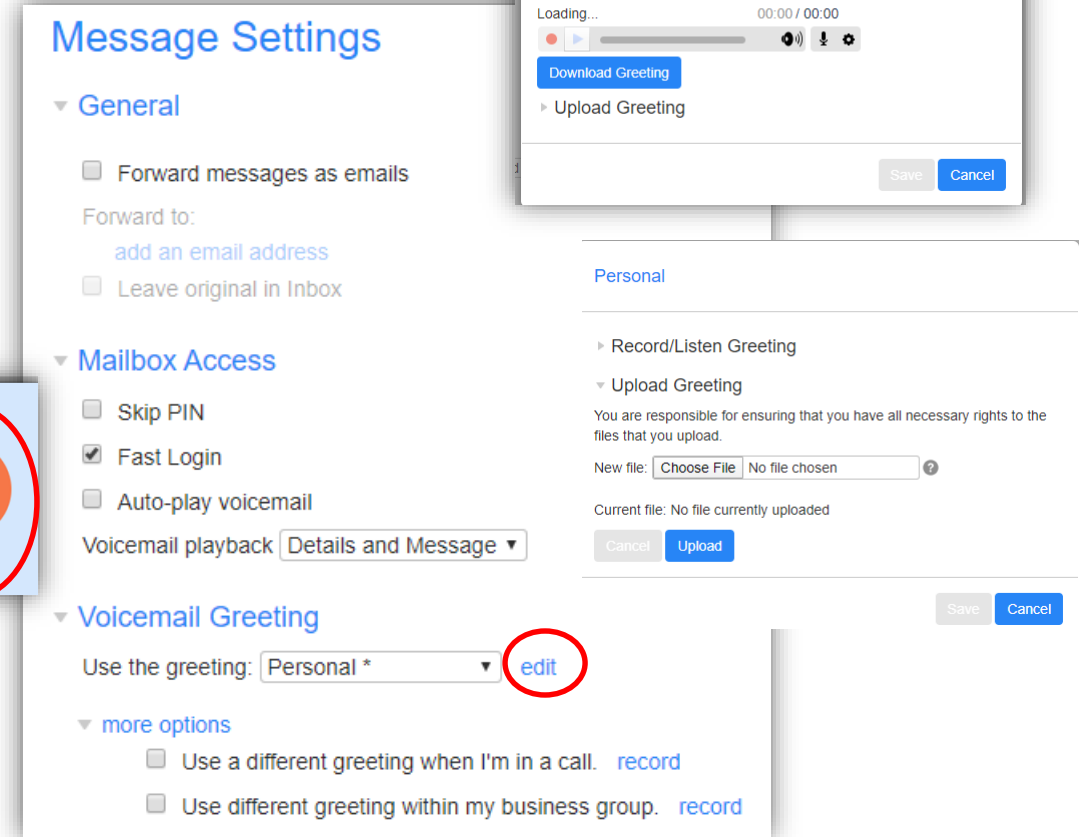
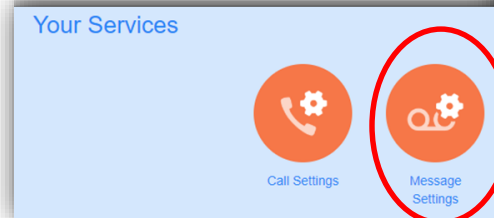
- **Message Settings** are found under **Your Services** at the bottom of the **Home** page
- The **General** section allows you to receive voicemail notifications as an email > Click the **add an email address** to add the desired email
- The **Mailbox Access** section allows you to manage mailbox settings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



CommPortal— Getting Oriented

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**



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

CommPortal— Getting Oriented

Settings – Notifications

Call Settings Message Settings Notifications Account Codes

Notifications Clear List New Entry Apply Cancel

▼ Message Waiting Indicator

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

Phone Number	Urgent Voicemail	All Voicemail
(435) 783 4974	<input type="checkbox"/>	<input checked="" type="checkbox"/>

New Entry

Phone Number:

Add Cancel

You can *remove* phone numbers by:

- 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**

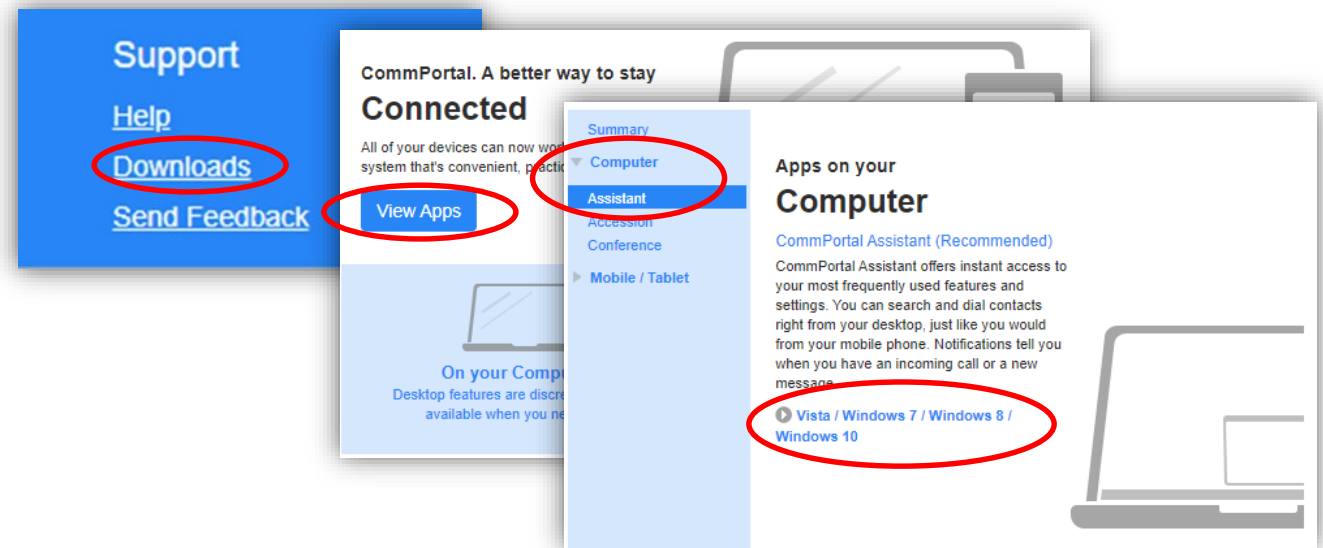
You can also specify which type of voicemail you want to be notified of—**Urgent** or **All**—by clicking the appropriate box and clicking **Apply**.

CommPortal— Getting Oriented

Apps – Computer

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

- 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.)



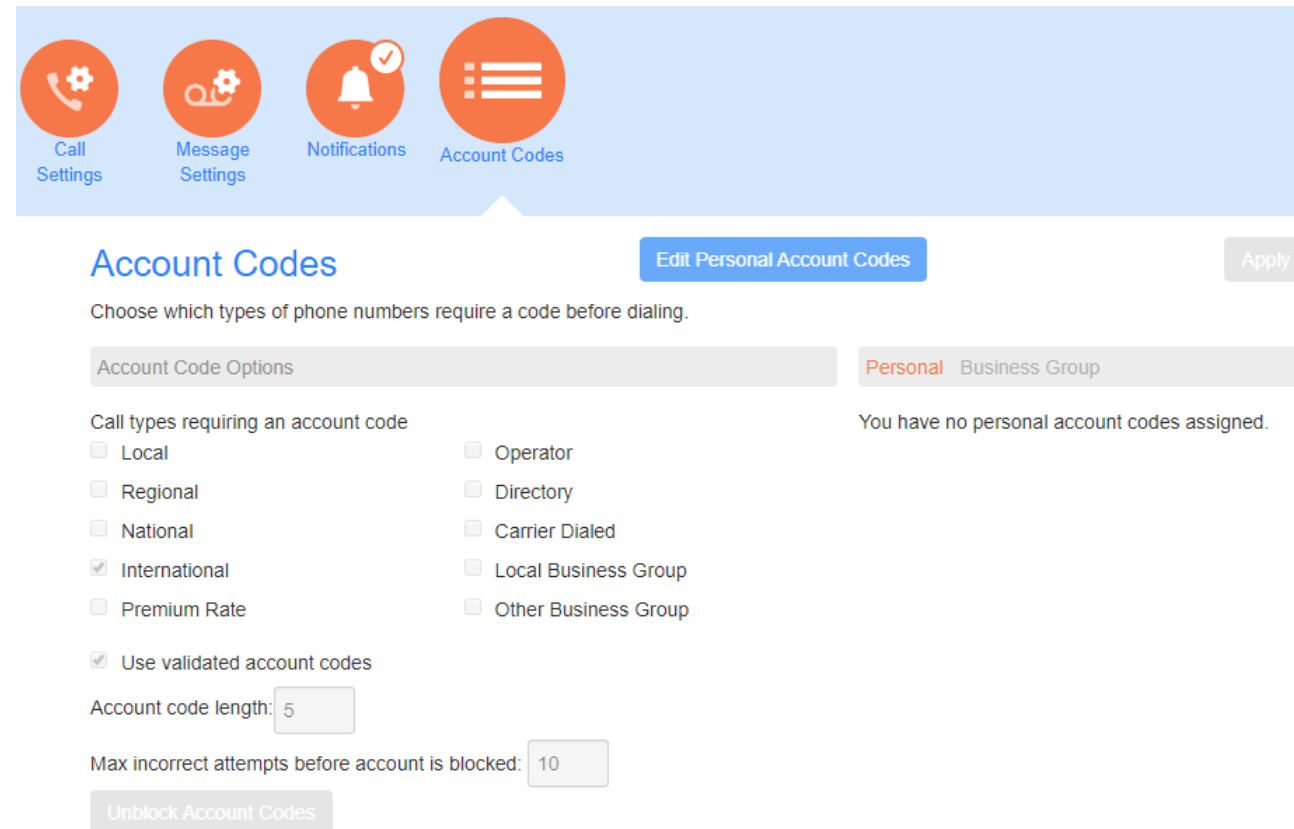
**Compatible with Vista / Windows 7, 8 or 10*

CommPortal— Getting Oriented

Settings – Account Codes

Account Codes are set by your administrator.

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



The screenshot shows the 'Account Codes' settings page in the CommPortal interface. At the top, there is a navigation bar with four icons: 'Call Settings', 'Message Settings', 'Notifications', and 'Account Codes'. The 'Account Codes' icon is highlighted. Below the navigation bar, the page title 'Account Codes' is displayed, followed by a button 'Edit Personal Account Codes' and an 'Apply' button. The main content area is titled 'Account Code Options' and contains a section 'Call types requiring an account code' with a list of checkboxes: 'Local', 'Regional', 'National', 'International' (checked), 'Premium Rate', 'Operator', 'Directory', 'Carrier Dialed', 'Local Business Group', and 'Other Business Group'. Below this list, there is a checkbox 'Use validated account codes' which is checked. At the bottom, there are two input fields: 'Account code length' with the value '5' and 'Max incorrect attempts before account is blocked' with the value '10'. An 'Unblock Account Codes' button is located at the bottom left of the form.

Account Codes

Edit Personal Account Codes

Apply

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

Account Code Options

Personal Business Group

You have no personal account codes assigned.

Call types requiring an account code

- ☐ Local
- ☐ Regional
- ☐ National
- ☒ International
- ☐ Premium Rate
- ☐ Operator
- ☐ Directory
- ☐ Carrier Dialed
- ☐ Local Business Group
- ☐ Other Business Group

☒ Use validated account codes

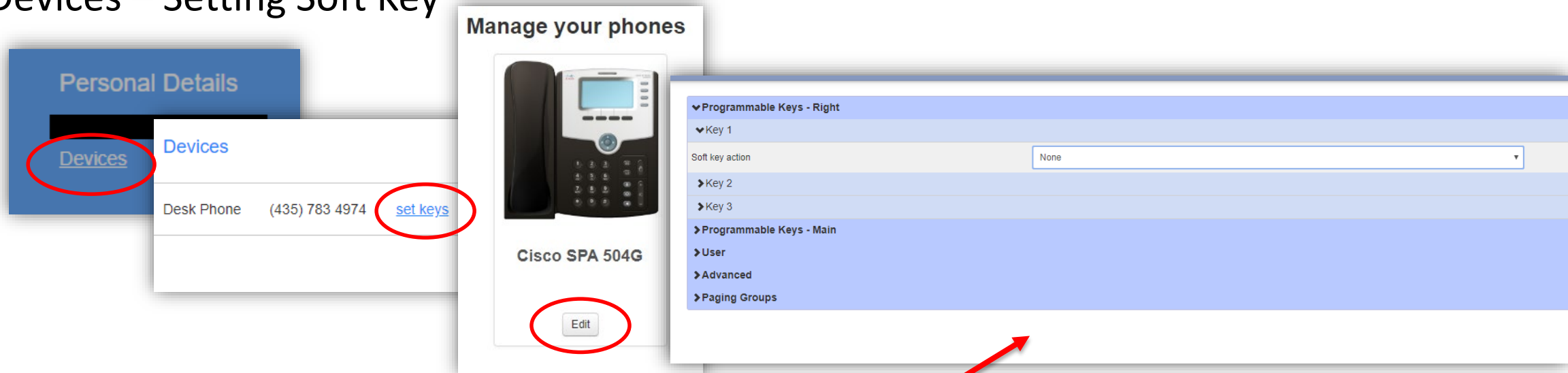
Account code length: 5

Max incorrect attempts before account is blocked: 10

Unblock Account Codes

CommPortal— Getting Oriented

Devices – Setting Soft Key



- 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

