

# **The Aero Group**

## **End User Guide**

**V8.3.10/ Release 1**

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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.

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.

- Chapters 2 to 8 outline the most common tasks that you will carry out when using your new desk phone, including
  - making internal and external calls
  - answering calls using either the handset or speakerphone
  - setting up call forwarding using your handset
  - accessing your messages through the voicemail system
  - moderating and taking part in conference calls.

These chapters also describe some more advanced call handling features, such as

- putting calls on hold
- transferring calls
- conferencing a third person into a two-way call
- parking calls.

You should familiarize yourself with these chapters first so that you can begin using your phone as soon as possible.

- Chapters 9 to 19 describe the more advanced functions and features of your phone system, including using the online CommPortal interface to manage your messages, missed calls, contacts and phone settings.
- Appendix A contains a quick-reference guide to all of the access codes that you will need when using your new phone.
- Appendix B can be used to record information that you will need frequently when using your phone system, such as phone numbers, codes and conferencing information.

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



## 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. For example, 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. For example, 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 the emergency number for your locale, for example 911. If you need to dial a code when calling an external number, you will also need to dial that code before calling the emergency number.

Note that depending on your phone type and configuration the call may not complete automatically once you have finished dialing. For example, 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 (for example, on snom phones) or the **Dial** key (for example, on Aastra or Polycom phones).

### 2.5 Ending calls

To end a call replace the handset, or press the **Cancel** key (for example, on snom phones), the **Drop** or **Goodbye** key (for example, on Aastra phones), or the **End Call** key (for example, on 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 example, on 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 Delayed) 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 14 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.

For example, to use immediate call forwarding to forward all calls, you would dial \*72. 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.

On some telephone systems, you may be able to dial a single access code to turn off all the Immediate, Busy or No Answer Call Forwarding call services.

### 4.2.3 Access codes

Table 1: Call Forwarding access codes

Type of forwarding	Enable Code	Disable Code
Immediate/Unconditional	<b>*72</b>	<b>*73</b>
Busy	<b>*90</b>	<b>*91</b>
No Answer/Delay	<b>*92</b>	<b>*93</b>
All services	<b>n/a</b>	<b>n/a</b>

## 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 (for example, on snom phones) or the **Pickup** key (for example, on Aastra or Polycom phones). If you've made another call since you put the first call on hold, you'll need to end 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 (for example, on snom phones) or the **Answer** key (for example, on 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 (for example, on snom or Polycom phones) or the **Xfer** key (for example, on 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 (for example, on snom phones), the **Xfer** key (for example, on Aastra phones), or the **Blind** key (for example, on 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 (for example, on snom phones) or the **Conference** key (for example, on 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 (for example, on snom or Polycom phones) or the **Xfer** key (for example, on 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 your 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.

**Table 2: Mailbox Commands**

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



# 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.

**Table 3: Moderator commands**

- 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 Aero Group 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

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.

## 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 17.4.

## 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 websites: <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.myaerophone.com>.

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

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

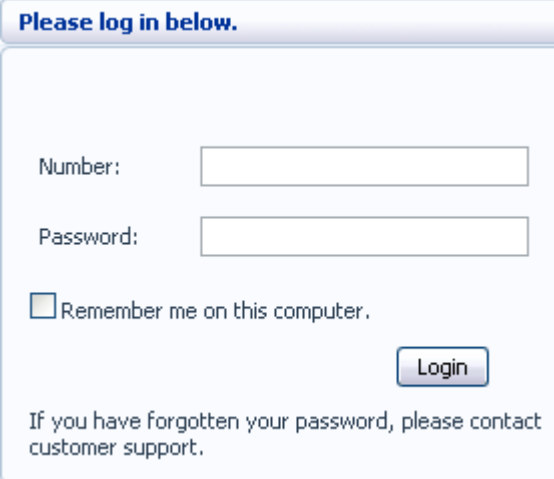
JavaScript must be enabled on your browser.

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

### 9.2 Logging in

The following shows a sample CommPortal login page.

Figure 1: CommPortal login page



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

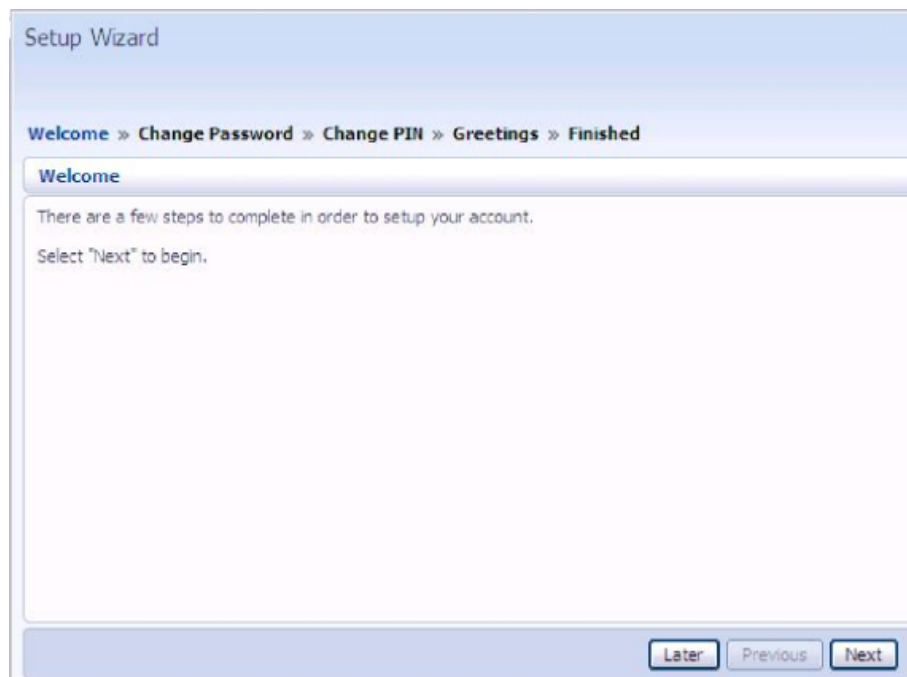
If you are using a public computer, do not tick the *Remember me on this computer* checkbox and always make sure you explicitly log out of CommPortal when you have finished, as described in 9.6, to protect your account from being accessed by other users.

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

### 9.2.1 Using the CommPortal initialization wizard

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

**Figure 2: CommPortal Initialization Wizard**



- From the Welcome screen, click *Next* to begin.
- Follow the instructions to change your password.
  - You must complete this step before you can access your account, but you can use the TUI to do this if you prefer.
  - In some systems, there may be password checks to ensure that you choose a password that cannot easily be guessed by a malicious user. If you choose a password that does not pass these checks, for example because it includes your telephone number, you will see an explanation and be prompted to enter a different password.

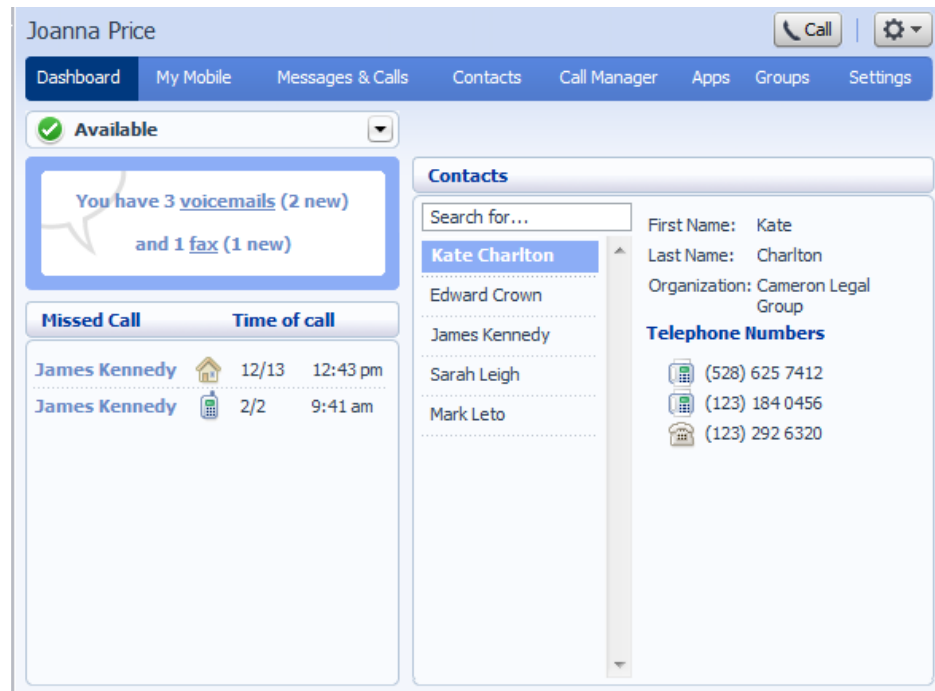
- When you have successfully entered your new password, click *Next* to continue to the next step.
- Now, if you have one, change your PIN, and click *Next*.
- If you have a microphone on your computer, you may want to record your spoken name and initial greeting now, but you can click *Later* if you do not want to do this now.

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

## 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.

Figure 3: CommPortal Dashboard



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

- Dashboard. This is the at-a-glance summary you see when you first log into CommPortal.
- Messages & Calls. This shows you all of your voice, fax and video messages, and the calls you've made, answered or missed.

- **Contacts.** You can add and view all of your contacts and their phone numbers in this tab.
- **Call Manager.** The Call Manager page lets you configure the incoming call and call forwarding services on your phone line, like Call Forwarding and Selective Call Rejection.
- **Reminders.** This page allows you to set up reminder calls.
- **Groups.** Here you can view any groups your line belongs to, such as hunt groups. You can also login and logout of groups here.
- **Settings.** The Settings page gives you access to numerous other options, such as changing your passwords and PINs, and configuring the keys on your phone.

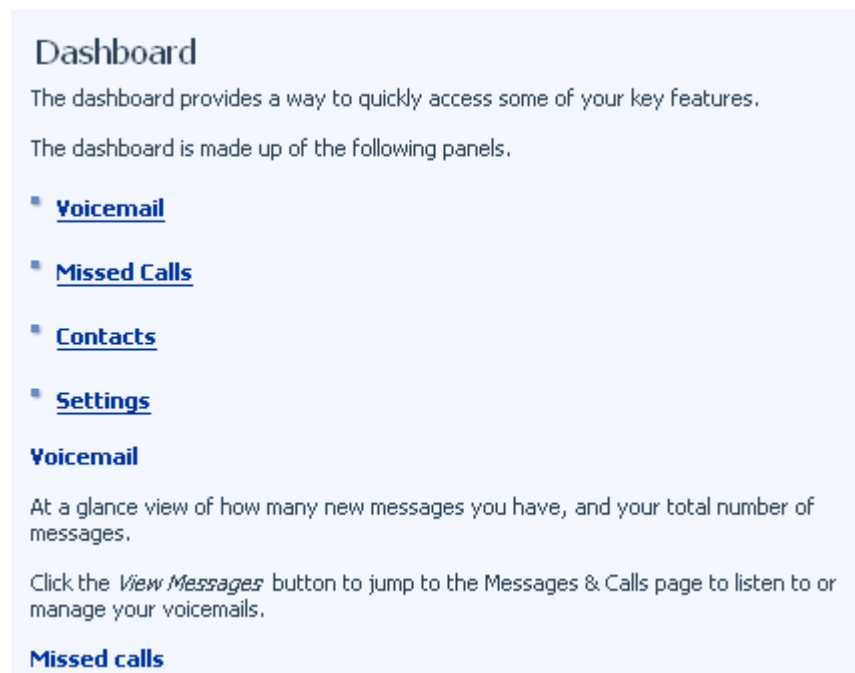
Using the functions in each of these pages is described in more detail in the rest of this document.

## 9.4 Getting help


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

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


**Figure 4: CommPortal Help**



## 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 More Options icon  and then select Refresh.

## 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 More Options icon  and then selecting Logout.

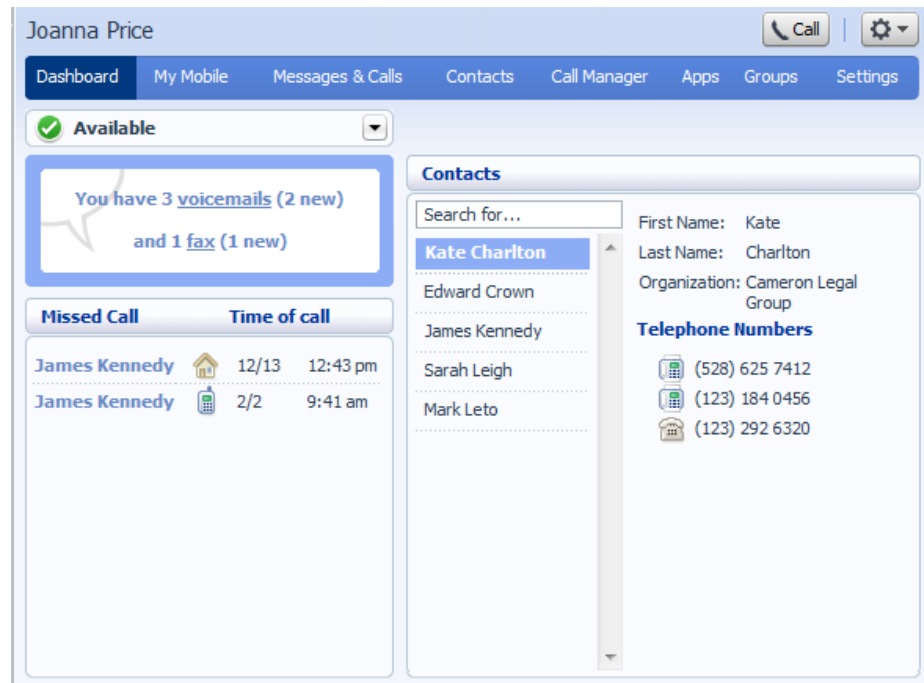


# 10 CommPortal Dashboard

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:

Figure 5: CommPortal Dashboard



## 10.1 Messages

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

Figure 6: CommPortal Dashboard New Voice Message Count



To view and listen to new messages, click on the *voicemail* link. This will take you to the Messages & Calls page, which is described in Section 11.

## 10.2 Missed calls

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

Figure 7: CommPortal Dashboard Missed Calls display



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


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

### 10.2.1 Call back

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

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

Figure 8: Call back pop up

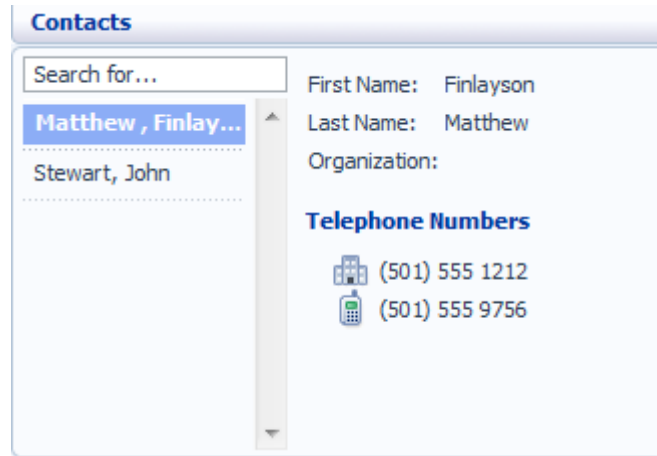


Missed Call	Time of call
Unknown 11/2	12:43 pm
(208) 362 2087 9/26	12:43 pm
Dial (208) 362 2087 from 6 (534) 789 6543	
Dial (208) 362 2087 from other number...	
(208) 362 2244 9/24	4:19 pm

## 10.3 Contacts

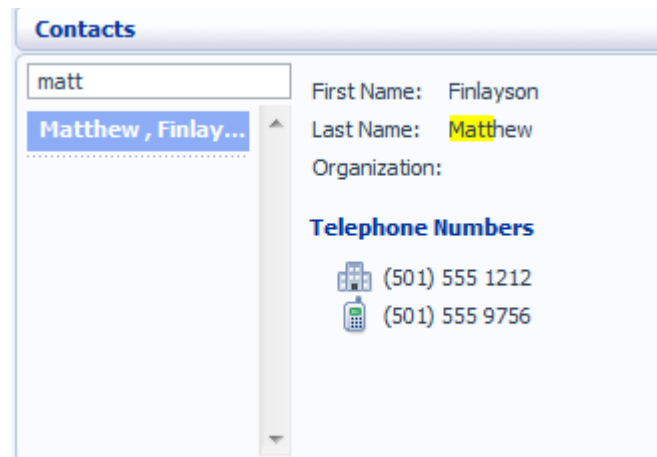
The Contacts section displays all of your contacts and allows you to search them:

**Figure 9: CommPortal Dashboard Contacts display**



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

**Figure 10: Search Contacts**



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

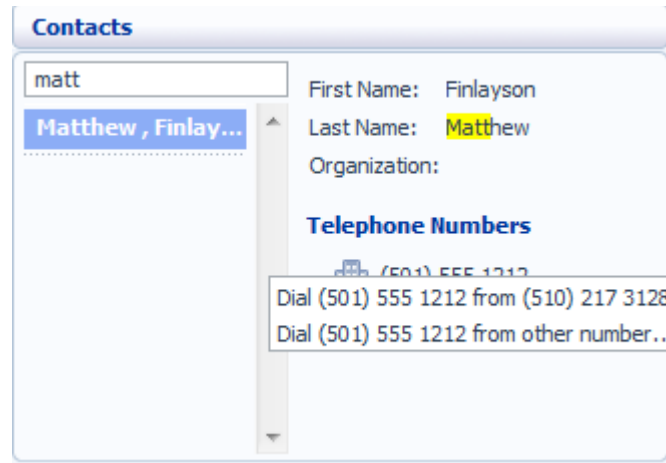
To add, modify or delete contacts, see Section 12.

### 10.3.1 Calling a contact

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

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

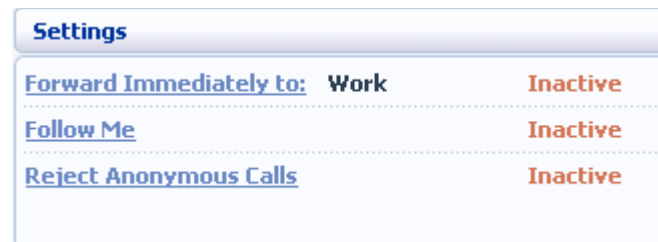
Figure 11: Click To Dial pop up



## 10.4 Settings

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

Figure 12: CommPortal Dashboard Settings display



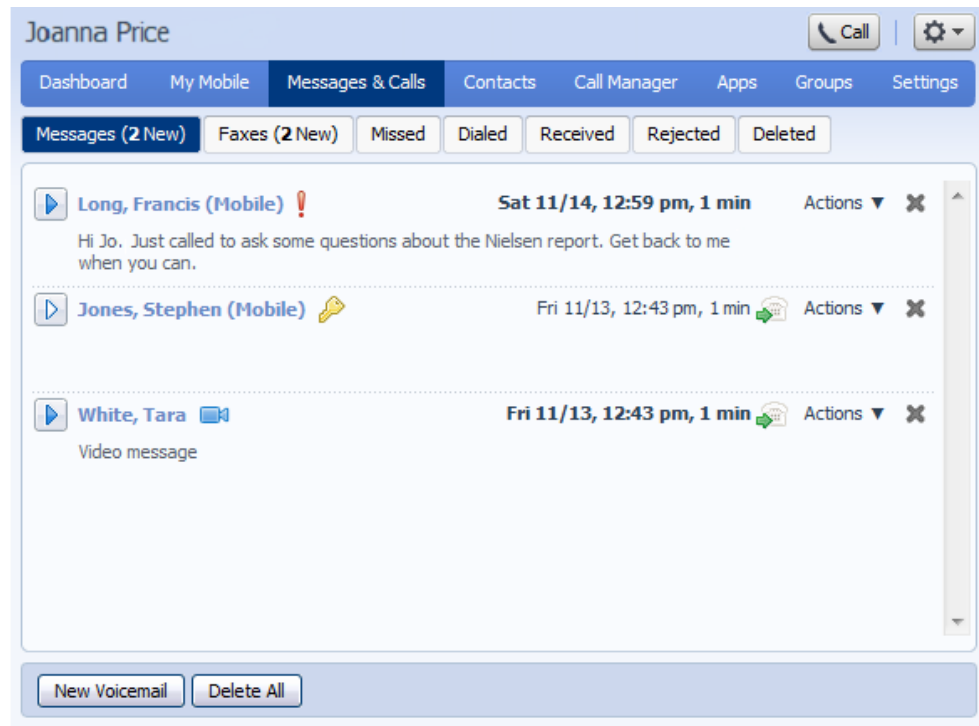
In the example above Call Forwarding Immediate, the Follow Me service and Anonymous Call Rejection are all inactive (disabled).

To change one of these settings you can either click on the link for that setting, or select the Call Manager page, described in Section 14.

# 11 Messages & Calls

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

Figure 13: CommPortal Messages & Calls page



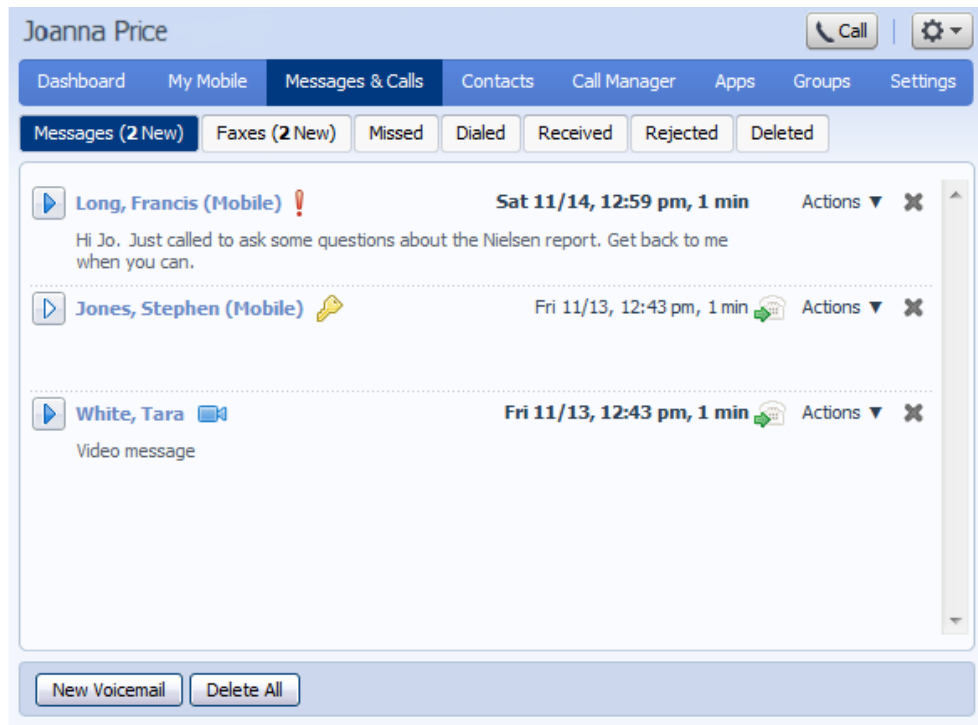
- The *Messages* tab shows you all of your new and stored voice messages.
- The *Faxes* tab shows you any new and stored fax messages.
- The *Missed* tab displays the recent calls you have received and not answered.
- The *Dialed* tab displays the recent calls you have made, including those made by Click To Dial as described in Section 18.
- The *Received* tab shows the recent calls you have answered.
- The *Rejected* tab shows the recent calls that you have rejected (if you have a Call Manager service, as described in Chapters 1 (Business Call Manager), 14 (Easy Call Manager) and 15 (Incoming Call Manager)).
- In some systems, you will see a *Deleted* tab, which shows any messages that you have deleted on the other tabs.

These tabs are described in more detail below.

## 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:

Figure 14: Messages & Calls – Messages tab

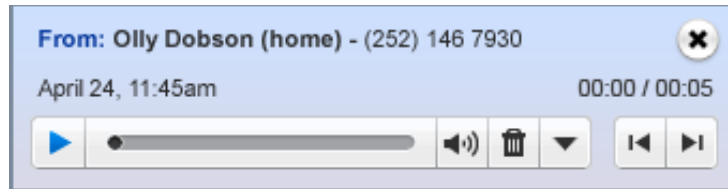


## 11.1.1 Listen to a message

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

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

**Figure 15: Voicemail Player**

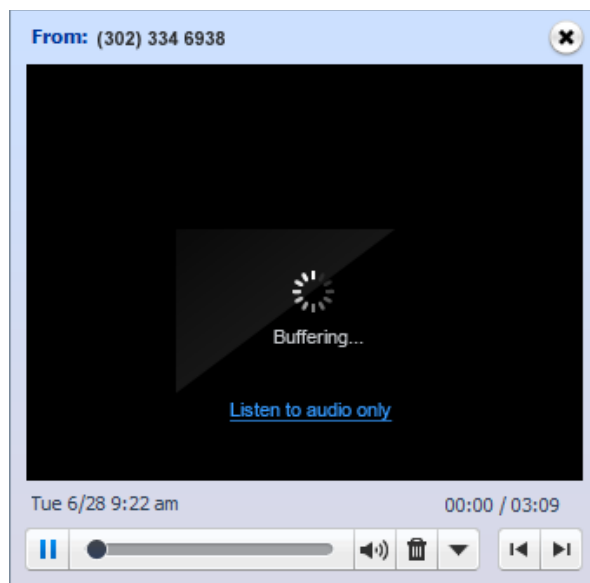


With this player you can:

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

You may see a larger version of the player, as illustrated below.

**Figure 16: Large Message Player**



- If you are able to use video messaging, you will see the video content of your messages in the large window.
- If you have the Speech to Text service, you will see a transcript of the message.

### 11.1.2 Deleting a message

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

- In some systems, the message will be permanently deleted.
- In some systems, the message will be moved to the *Deleted* tab described in section 11.6.

### 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:


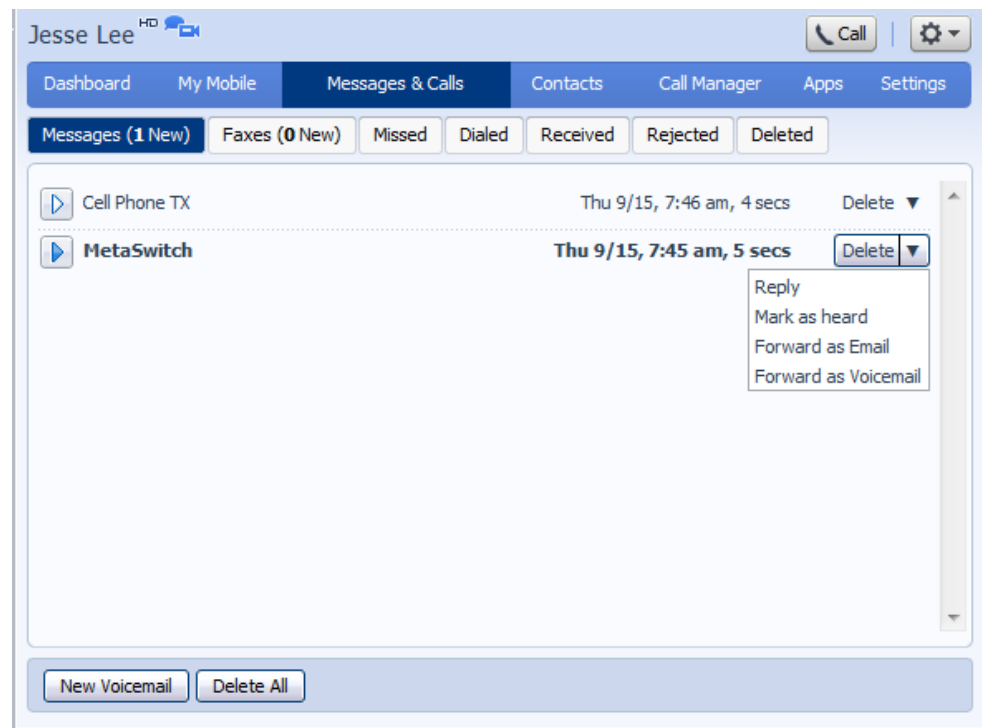

- Click on the  icon to the right of the message and select Mark as heard from the dropdown.

Figure 17: Message options drop down menu



### 11.1.4 Marking a message as new

To mark a message as new, follow these steps:

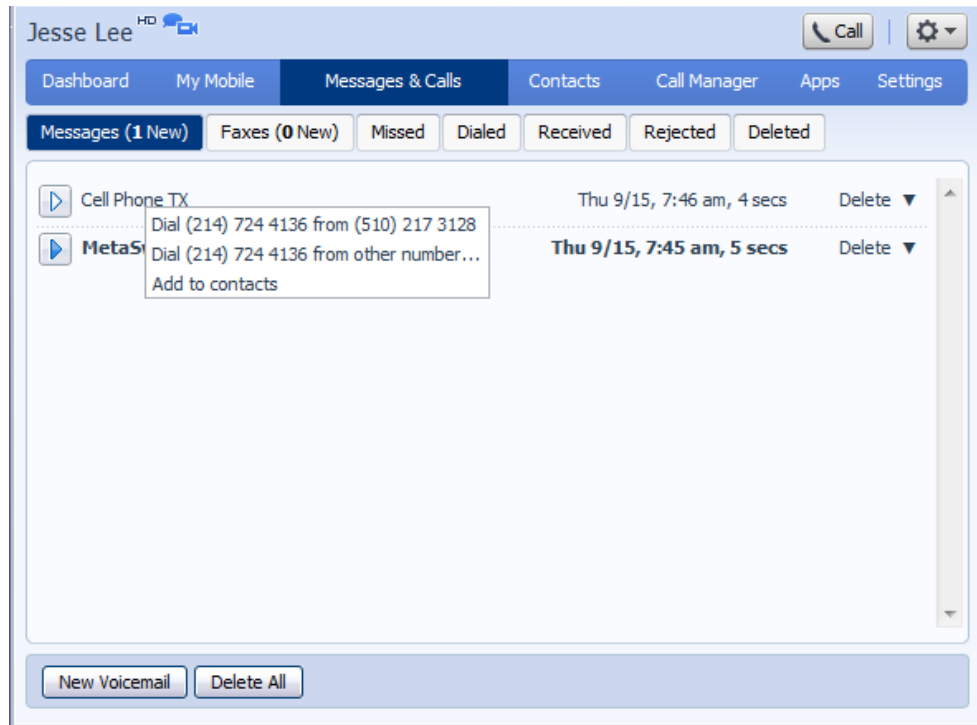
1. Click on the  icon to the right of the message, as shown in Figure 17.
2. Select Mark as new from the dropdown.

### 11.1.5 Call back

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

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

**Figure 18: Call back message sender**



### 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 number or name of the caller.
2. Select the *Add to contacts* option.
3. This will take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 12 for more information on using the Contacts page.

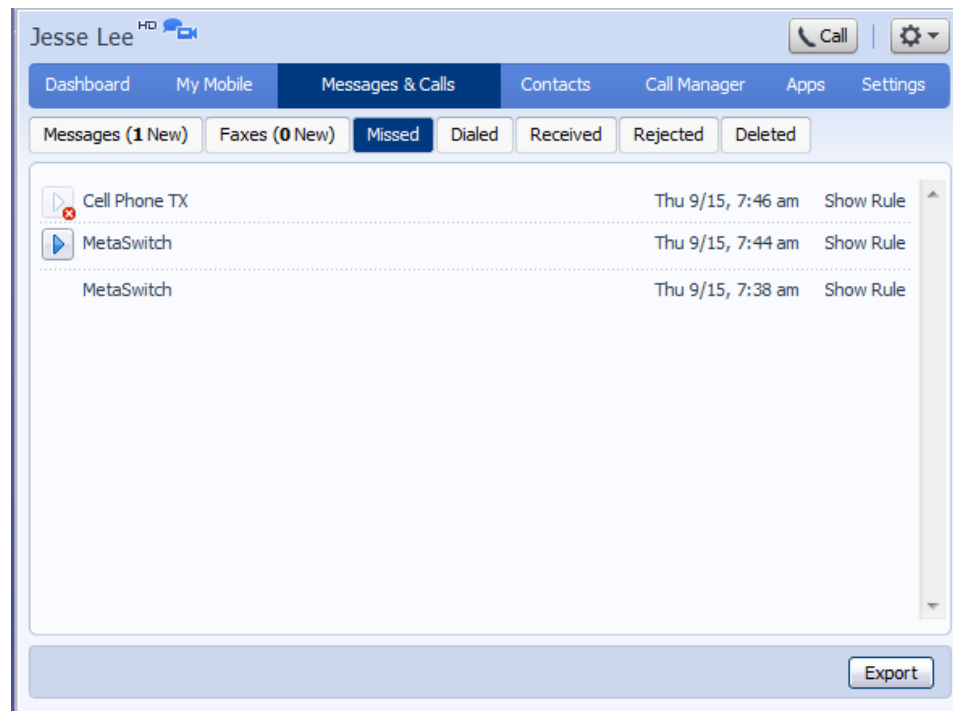
## 11.2 Faxes

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:

**Figure 19: Messages & Calls – Missed tab**



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

### 11.3.1 Add caller to contacts

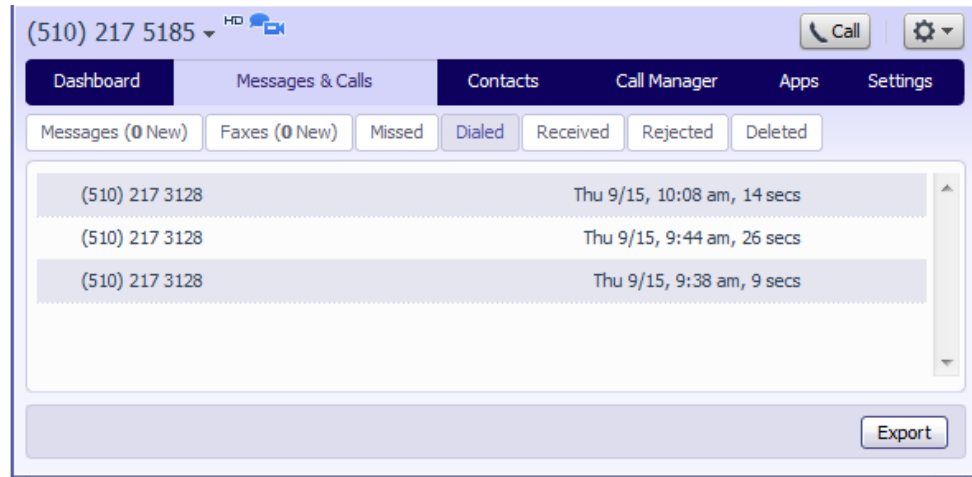
To add the number of someone who called you to your Contacts, follow these steps:

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

**Figure 20: Messages & Calls – Dialed tab**



### 11.4.1 Add dialed number to contacts

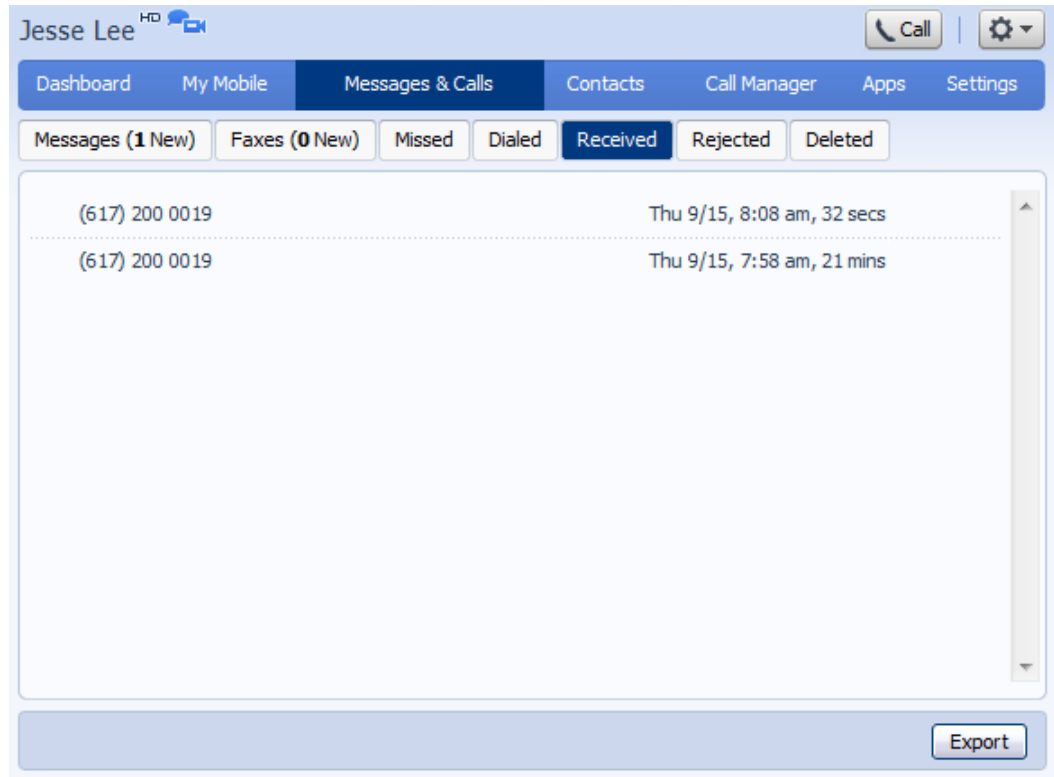
To add the number of someone you called to you to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 12 for more information on using the Contacts page.

## 11.5 Received

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

Figure 21: Messages & Calls – Received tab



### 11.5.1 Add number to contacts

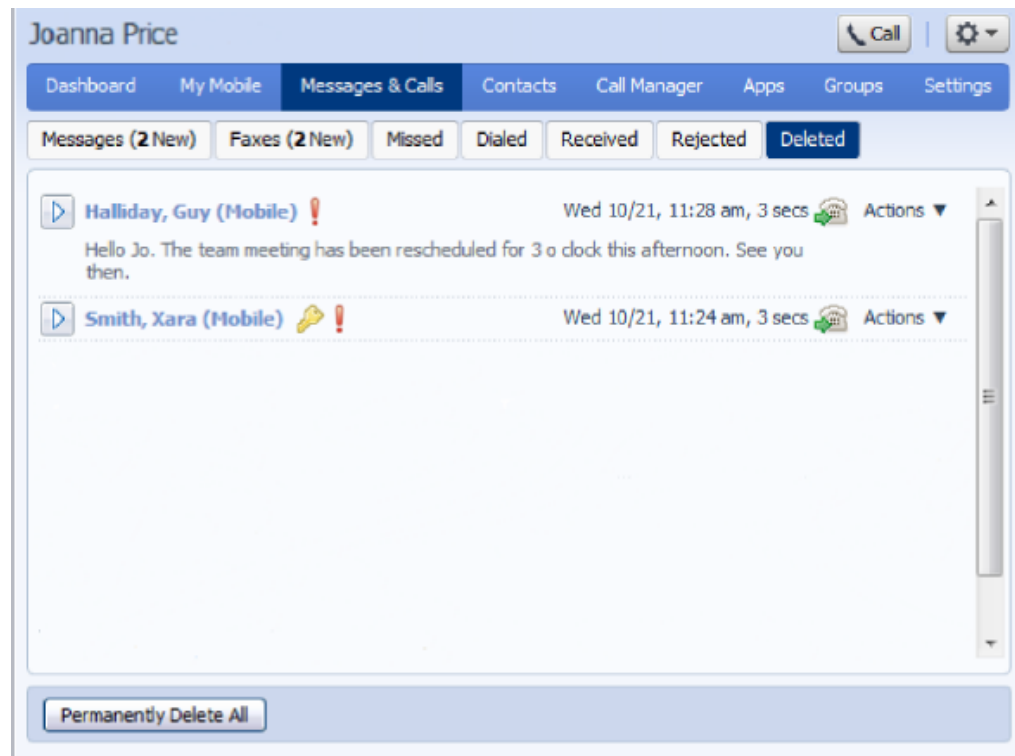
To add the number of someone who called you to your to your Contacts, follow these steps:

1. Click on the number or name of the caller.
2. Select the *Add to contacts* option.
3. This will now take you to the Contacts page. Enter the details for your new contact and click on *Save*. See Section 12 for more information on using the Contacts page.

## 11.6 Deleted


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

Figure 22: Messages & Calls - Deleted Tab



### 11.6.1 Listen to deleted messages

To listen to messages on this tab:


1. Click the play icon to the left of the message: 
2. Use the Voicemail Player described in section 11.1.1.
3. Click the *Restore* button on the Voicemail player if you want to return this message to the *Messages* tab.

### 11.6.2 View deleted faxes

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

### 11.6.3 Restoring deleted messages and faxes

To restore messages and faxes:

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

## 11.6.4 Permanently delete messages

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

To delete a single item:

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

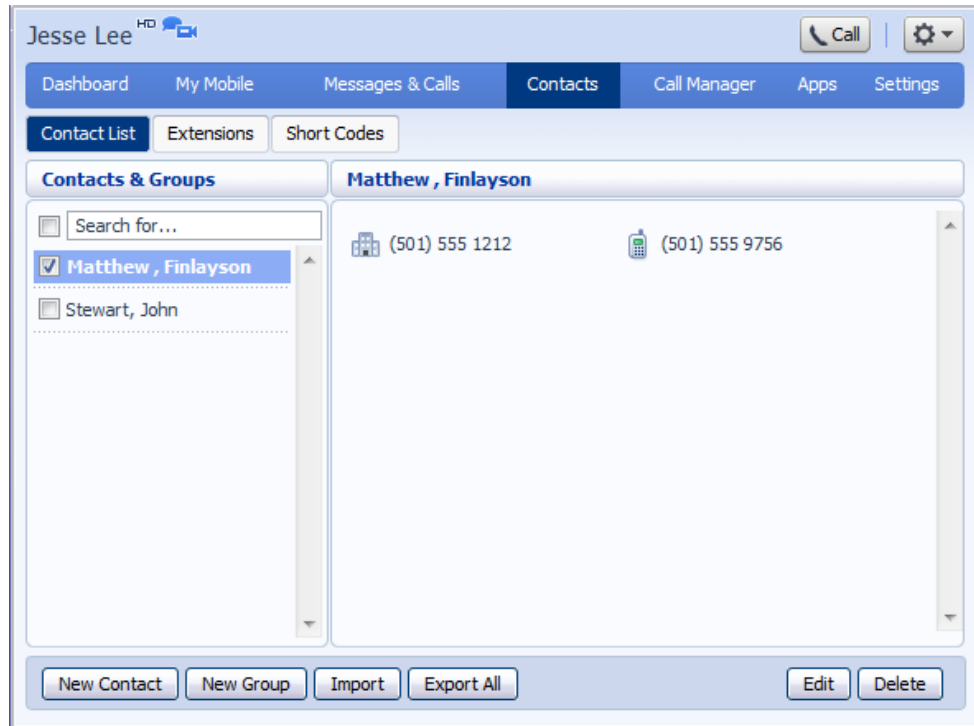
To delete all the messages and faxes on this tab:

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

# 12 Contacts

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

**Figure 23: CommPortal Contacts page**



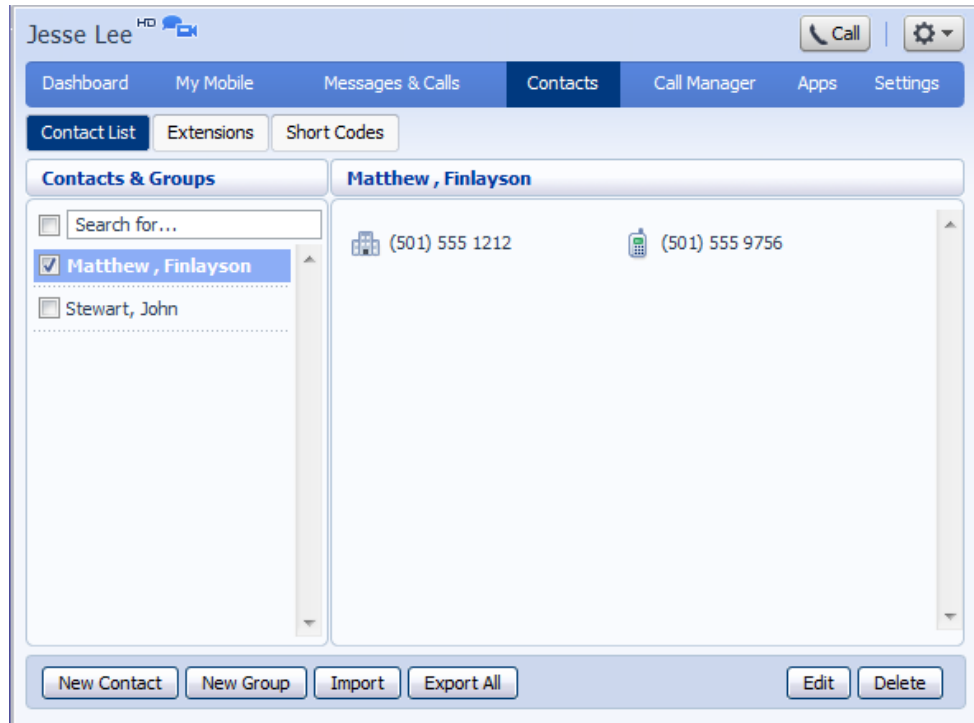
- The Contact List tab allows you to manage your personal contact list.
- The Speed Dials tab is where you configure your numeric speed dials (if your phone supports these).
- The Extensions tab shows you the extensions within your business.
- The Short Codes tab shows you your business's numeric speed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

Each of these sections is described in more detail below.

## 12.1 Contact List

The Contact List shows you all of your contacts:

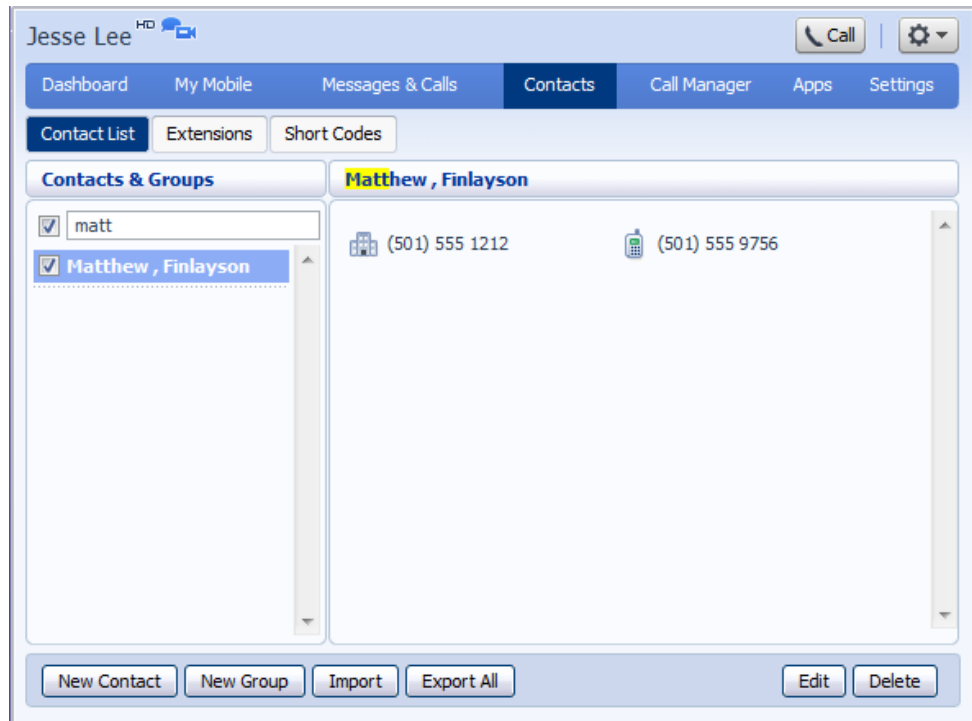
Figure 24: Contacts – Contact List tab



### 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:

Figure 25: Search contacts



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:

- Click on New Contact.

Figure 26: CommPortal new contact page

The screenshot shows the 'CommPortal' interface for adding a new contact. The user is logged in as 'Jesse Lee'. The 'Contacts' tab is active in the top navigation bar. Below it, there are tabs for 'Contact List', 'Extensions', and 'Short Codes'. The 'Contact List' sidebar on the left shows a list of contacts: 'matt' and 'Matthew, Finlayson'. The main form area contains the following fields:

- First Name: [Empty]
- Last Name: [Empty]
- Nickname: [Empty]
- Job Title: [Empty]
- Organization: [Empty]
- Home: [Empty] (with a house icon)
- Work: [Empty] (with a building icon)
- Mobile: [Empty] (with a mobile phone icon)
- Fax: [Empty] (with a fax machine icon)
- Other: [Empty] (with a telephone icon)

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

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

Figure 27: Completed new contact form

The screenshot shows the same 'CommPortal' interface, but the contact form is now filled out with the following information:

- First Name: Bob
- Last Name: Smith
- Nickname: Bobby
- Job Title: VP Sales
- Organization: Widget Corp
- Home: [Empty] (with a house icon)
- Work: 214-555-1212 (with a building icon)
- Mobile: [Empty] (with a mobile phone icon)
- Fax: [Empty] (with a fax machine icon)
- Other: [Empty] (with a telephone icon)

The 'Save' and 'Cancel' buttons are still visible at the bottom right.

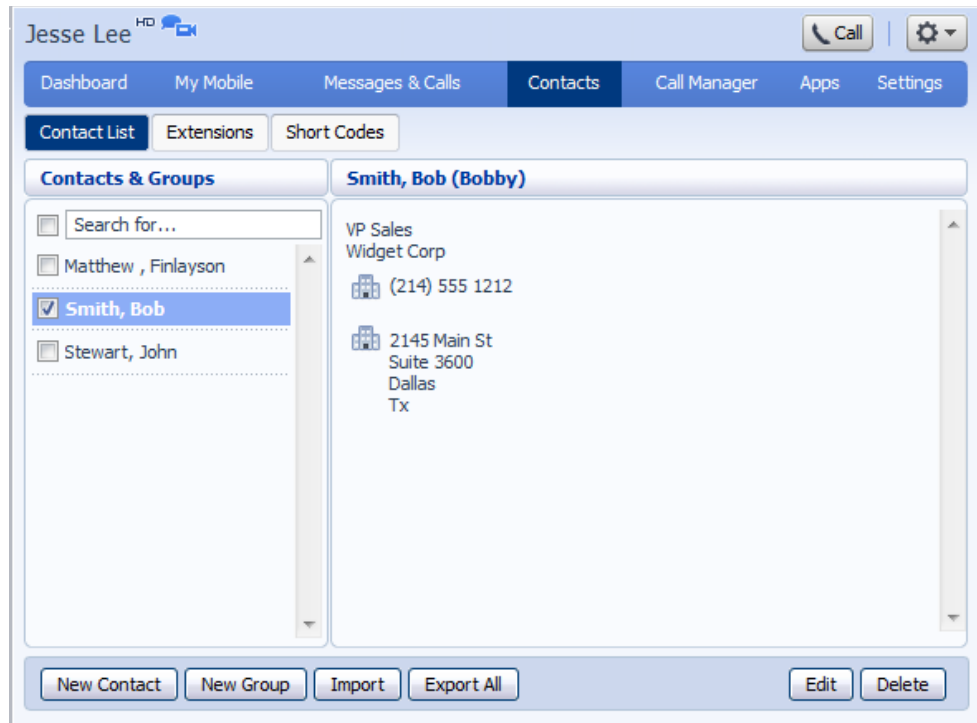
- Enter any phone numbers for your contact in the text boxes provided. You can select the radio button to the right of a number to indicate that it is the preferred number for this contact.
- Enter any addresses for your contact in the text boxes provided.

**Figure 28: CommPortal new contact page**

The screenshot displays the 'CommPortal' interface for adding a new contact. The user is logged in as 'Jesse Lee HD'. The 'Contacts' tab is active in the top navigation bar. On the left, under 'Contacts & Groups', there is a list of existing contacts: 'matt' and 'Matthew, Finlayson'. The main area is a form for a new contact. It includes a 'Name' field, an 'Address' field with a home icon, and fields for 'City', 'State', 'ZIP', and 'Country'. Below these is a second 'Address' field with a building icon and a 'City' field. 'Save' and 'Cancel' buttons are located at the bottom right of the form.

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

Figure 29: CommPortal contact details



### 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:

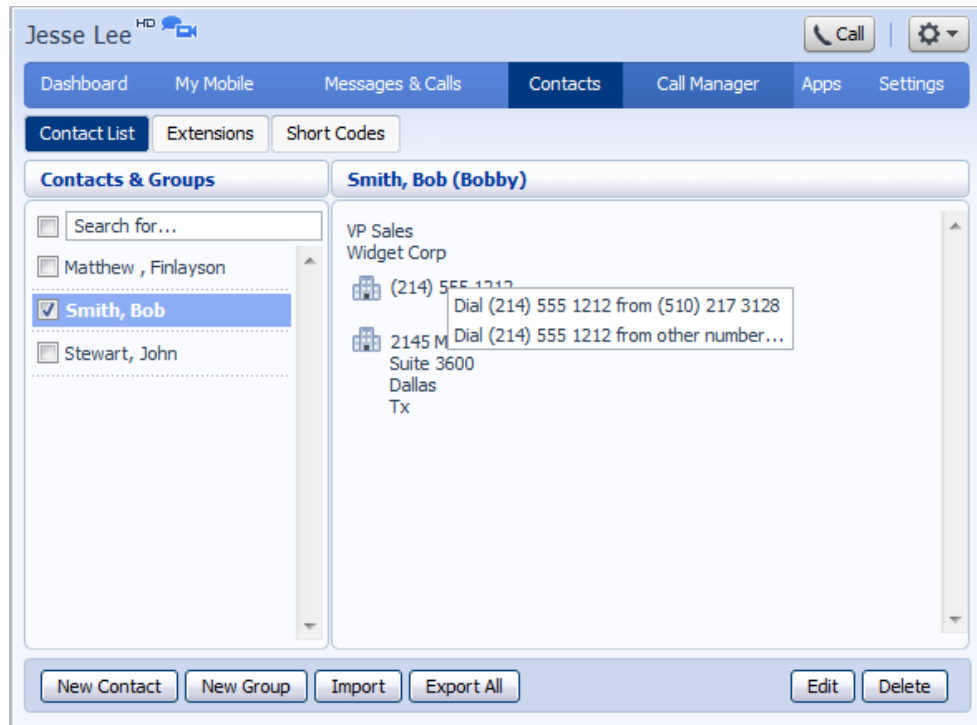
1. Select the contact you wish to delete from the list on the left hand side of the screen.
2. Click *Delete*.

### 12.1.5 Calling a contact

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

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

Figure 30: Calling a contact from the Contact List tab



## 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:

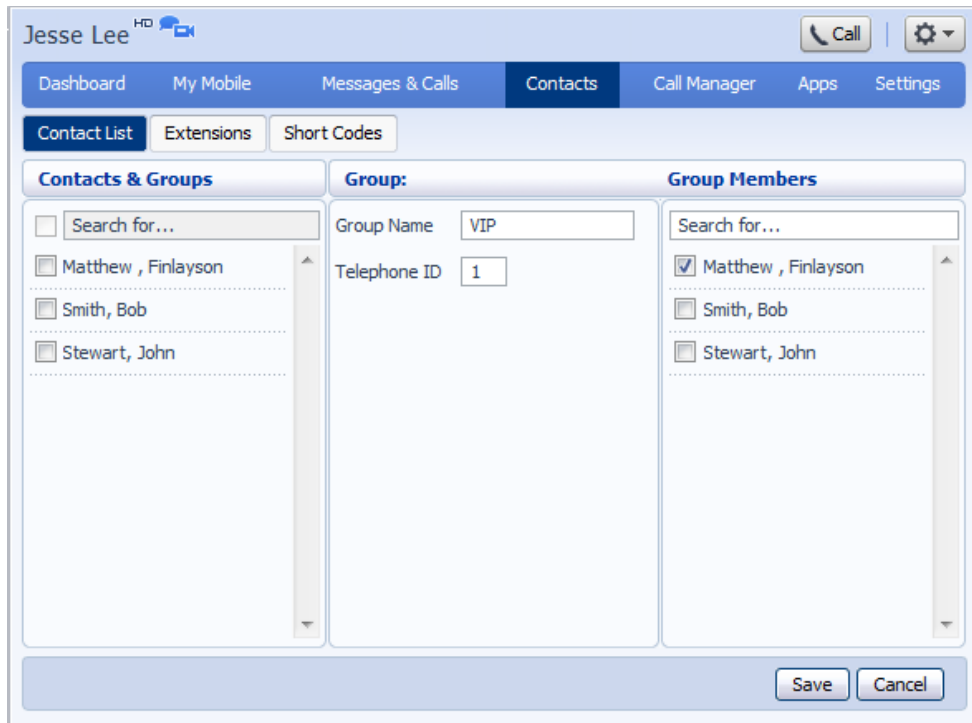
- Click on New Group.

Figure 31: Adding a new group

The screenshot shows a mobile application interface for adding a new group. At the top, the user's name 'Jesse Lee' is displayed along with a 'Call' button and a settings icon. Below this is a navigation bar with tabs for 'Dashboard', 'My Mobile', 'Messages & Calls', 'Contacts' (which is active), 'Call Manager', 'Apps', and 'Settings'. Underneath the navigation bar are three sub-tabs: 'Contact List', 'Extensions', and 'Short Codes'. The main content area is divided into three sections: 'Contacts & Groups', 'Group:', and 'Group Members'. The 'Contacts & Groups' section has a search bar and a list of contacts: 'Matthew , Finlayson', 'Smith, Bob', and 'Stewart, John'. The 'Group:' section has two input fields: 'Group Name' and 'Telephone ID'. The 'Group Members' section has a search bar and a list of the same three contacts. At the bottom of the form are 'Save' and 'Cancel' buttons.

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

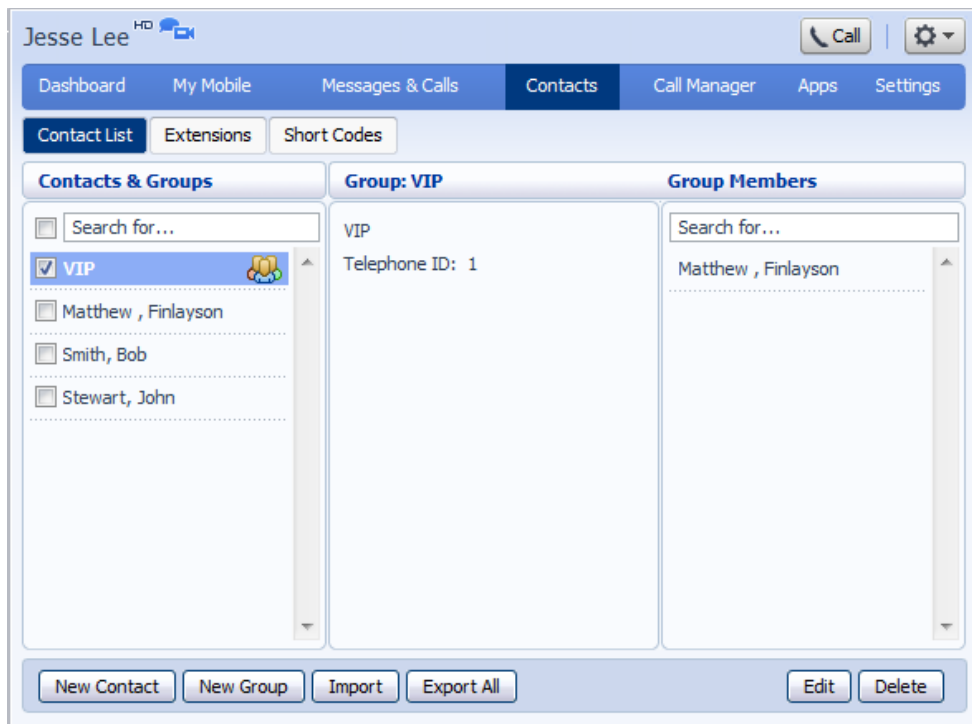
Figure 32: Adding a new group



- Click on *Save*.

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

Figure 33: Adding a new group



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:

**Figure 34: Contacts – Speed Dials tab**

The screenshot shows a user interface for Dan Smith. At the top, there are navigation tabs: Dashboard, Messages & Calls, Contacts (selected), Call Manager, Apps, and Settings. Below these are sub-tabs: Contact List, Speed Dials (selected), Extensions, and Short Codes. A descriptive text reads: "Makes dialing faster by allowing you to assign a one or two digit code to speed dial to different telephone numbers. One digit codes can range from 2-9. Two digit codes can range from 20-49." The main area is split into two sections: "Speed Dial Number" on the left, which contains the text "You have no speed dials set up.", and "New Speed Dial" on the right. The "New Speed Dial" section has a "Speed Dial:" dropdown menu with the value "2", a "Number:" text 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.

**Figure 35: Adding a speed dial**

(510) 217 5185 HD

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

Contact List **Speed Dials** Extensions Short Codes

Makes dialing faster by allowing you to assign a one or two digit code to speed dial to different telephone numbers. One digit codes can range from 2-9. Two digit codes can range from 20-49.

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

**New Speed Dial**

Speed Dial: 4

Number:

## 12.2.2 Deleting a speed dial

To delete a speed dial, follow these steps:

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

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

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

## 12.3 Extensions

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

Figure 36: Contacts – Extensions tab

Jesse Lee <sup>HD</sup>

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

Contact List **Extensions** Short Codes

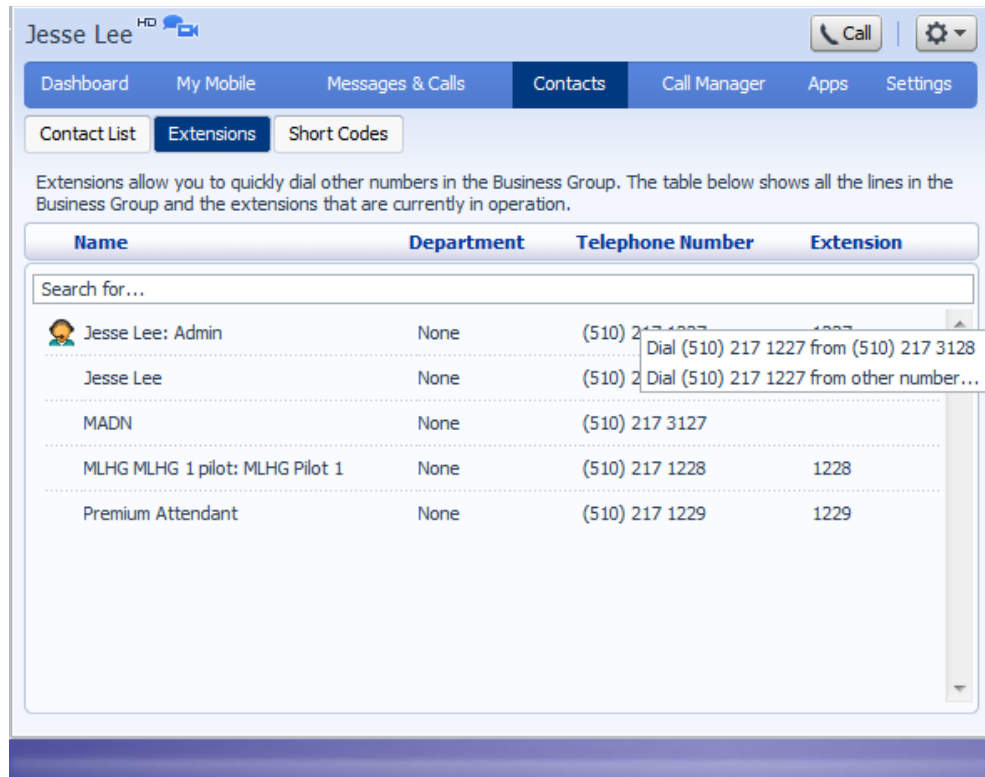
Extensions allow you to quickly dial other numbers in the Business Group. The table below shows all the lines in the Business Group and the extensions that are currently in operation.

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

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

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

Figure 37: Using Click To Dial from the Extensions tab



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:

**Figure 38: Contacts – Short Codes tab**

The screenshot displays a user interface for managing short codes. At the top, the user's name 'Jesse Lee' is shown along with a 'Call' button and a settings icon. Below this is a navigation bar with tabs for 'Dashboard', 'My Mobile', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', and 'Settings'. Under the 'Contacts' tab, there are sub-tabs for 'Contact List', 'Extensions', and 'Short Codes'. A text box explains: 'Short codes allow you to quickly dial common numbers. The table below shows the short codes currently in operation.'

Short Code	Telephone Number or Service Access Code	Department
1500 - 1510	(214) 555 1200 - (214) 555 1210	None

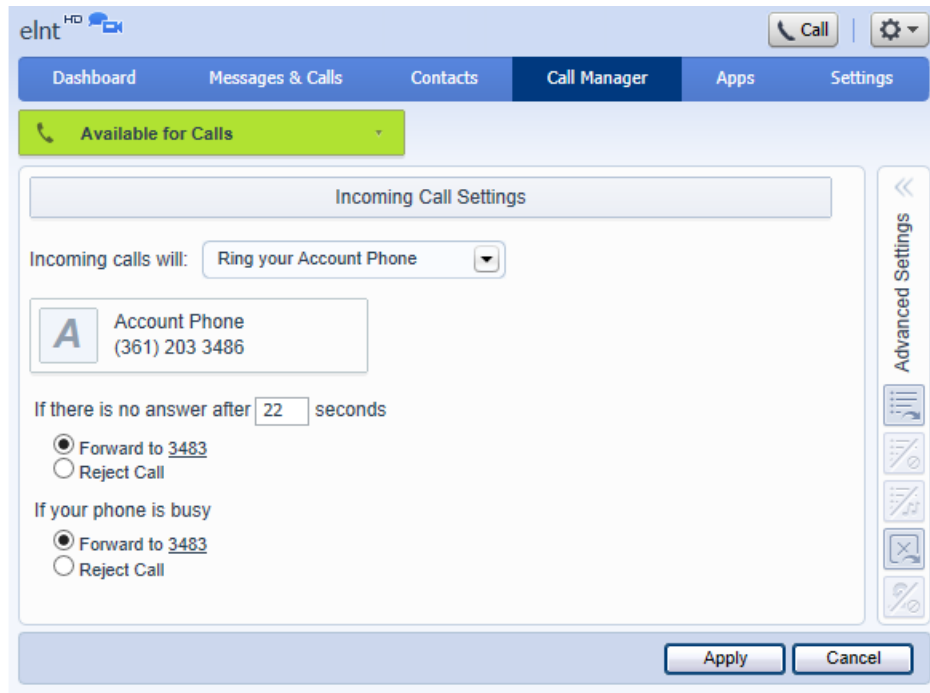
You can dial these short codes from any phone in the business to reach the destination. Your administrator sets up these short codes.



# 13 Business Call Manager (BCM)

Accessed on the **Call Manager** tab, Business Call Manager (BCM) enables you to configure and manage your incoming and call forwarding services on a single screen.

**Figure 39: Business Call Manager**



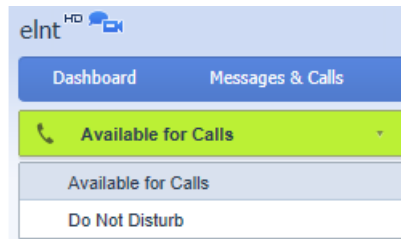
This chapter sets out how to use Business Call Manager.

- See 13.1 for details of how to use the Call Manager tab or Dashboard screen to set your availability.
- See 13.2 for details of how to configure your incoming call settings
- See 13.3 for details of how to configure advanced call settings
- See 13.4 for details of how to use the pop-ups that appear when you are setting call forwarding numbers or creating lists of callers to whom a particular call setting will apply.

## 13.1 Setting your availability

You can use the drop-down at the top left of the screen to set your status to either *Available for Calls* or *Do Not Disturb*.

**Figure 40: Configuring availability**



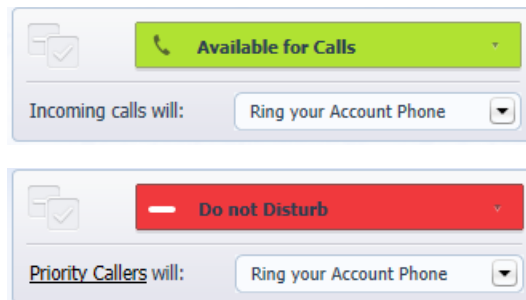
Use your mouse to select your status.

If you select *Do Not Disturb*:

- the lozenge turns red
- your incoming calls will usually be diverted to voicemail, although you can choose to allow priority callers to ring your phone as usual
- if you have also turned on Busy Call Forwarding, you will see a warning icon - when you click on this, you will see a pop-up explaining that calls will be forwarded to the Busy Call Forwarding number. You can click a link to deactivate this service if you want calls to either be rejected or, if you have a voicemail service, sent to voicemail.

This setting can also be changed on the CommPortal Dashboard screen described in 10. On the Dashboard, you can also use a drop-down to set the behavior for incoming calls.

**Figure 41: Call Manager settings on the CommPortal Dashboard**



## 13.2 Incoming Call Settings

In the central panel, you can configure your Incoming Call Settings. The options available on this panel will be different depending on whether your line status is set to *Available for Calls* or *Do Not Disturb*.

### 13.2.1 Configuring Incoming Call Settings when Available for Calls

You should generally set your line status to *Available for Calls* when configuring your Incoming Call Settings because some options are not configurable if your line status is set to *Do Not Disturb*.

You have a number of options on the Incoming Call Settings panel. You can configure

- how your phones will ring when you receive a call
- how the call should be handled
  - if you do not answer after a specified time
  - if your line is busy.

Once you have made all your changes, you must click *Apply* to save them.

### Configuring how your phone(s) will ring

Use the drop-down alongside *Incoming calls will:* to select one of the options.

If you select *Ring your Account Phone*, you will see a box with your account phone number in it. When you receive a call, this is the phone that will ring.

If you select *Ring your phones in order*, you will then be able to configure the order in which your different phones will ring.

In the following example, your mobile phone would ring first, then your account phone and finally both phones would ring together.

**Figure 42: Configuring ringing order**



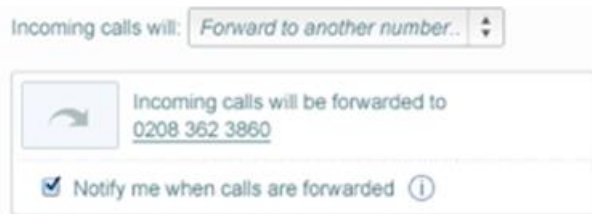
- You can optionally add more phones by clicking + and either selecting a phone number from a list of saved numbers, or entering the phone number. A new row will then be added.
- You can configure up to 6 ringing steps for each of your phones.
- You can change the length of ring for a step.
  - Hover over the timing column or over the marker along the top of the table.
  - Click and hold the handle that appears and drag left to right to change the length of ring.
  - The number indicator on the handle will indicate the current value.

- You can delete a phone from the table by hovering over the name/number field and clicking on the small cross that appears on the right of the name/number.
- When configuring these settings, you will see helpful pop-ups explaining the basics of what can be configured.

If you select *Ring your phones together*, all your phones will ring simultaneously when you receive a call. As on the *Ring your phones in order* option, you can add or delete the phones which will ring. Your phones will ring until you answer one of them, or until another call service kicks in, for example Delayed Call Forwarding, or until the call is rejected or sent to voicemail.

If you select *Forward to another number*, you can enter the number of the phone that should ring.

**Figure 43: Forwarding incoming calls**

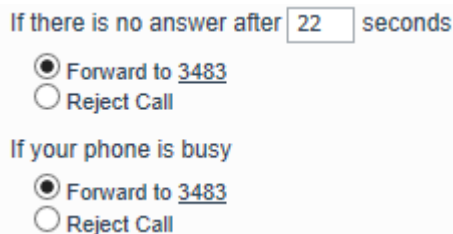


- Click the link to enter the phone number.
- Tick the checkbox if you want to be notified when calls are forwarded.
- If you configure call forwarding here, incoming calls are no longer under Business Call Manager control, so your Delayed or Busy call forwarding settings will be disabled.

### Call Forwarding Settings

You can also use the Incoming Call Settings panel to configure your Delayed and Busy call forwarding settings.

**Figure 44: Call Forwarding Settings**



- Use the text box to type in the number of seconds that your phone should ring before it is either forwarded to another number or the call is rejected.
  - If you have configured a ringing order for your phones, you must ensure that this is longer than the total length of time set for the ringing sequence.

- Use the radio button to choose what should happen if you do not answer your phone within the configured time.
  - If you choose to forward the call, use the link to set or change the forwarding number.
  - If you have a voicemail service, *Reject Call* will read *Forward to voicemail*.
- Use the radio button to choose what should happen if you are already on a call when another call comes in.

### 13.2.2 **Configuring Incoming Call Settings when Do Not Disturb is active**

If your line status is set to *Do Not Disturb*, you will have limited options for configuring your Incoming Call Settings.

Most of the options on the Incoming Call Settings panel will be grayed out and inactive unless you tick the checkbox alongside *Allow priority callers to ring as normal*.

- When this checkbox is ticked, you can follow the instructions in 13.2.1 to configure how calls from people on your priority callers list will be handled.
- Click the link on *priority callers* to view and edit the list of these callers.

## 13.3 **Configuring Advanced Settings**

The panel on the far right of the Business Call Manager screen includes icons for a number of advanced call services.

**Figure 45: Advanced Settings panel**



You can see the status of these call services at a glance:

- Services that are active are shown in bold.
- Services that are disabled are grayed out.
- Services that are active but are being overridden by another service have a warning icon.
  - Hover the cursor over the icon to see a pop-up that explains why a service is being fully or partially overridden.




When you click on one of these services, the panel expands to occupy part of the main BCM screen, with the Incoming Call Settings panel shrinking accordingly.



**Figure 46: Configuring Advanced Settings**



You can choose to 'pin' the expanded Advanced Settings panel in place by clicking . You will then see a summary of the current configuration for the service.

Depending on which services you have, you can configure the following Call Services on this panel. For some of these services, you will create a list of callers whose calls will trigger the service or enter a call forwarding number.

-  Forward Selected.
  - Click on *list* to configure the list of numbers.
  - Click the link on the phone number to set or change the number that calls from these callers will be forwarded to.
-  Reject Selected.
  - Click on *list* to set up the numbers where calls should immediately be rejected.
-  Distinctive Ringtone

- Click on *list* to enter any phone numbers which should ring your phone(s) with a different ringtone.
-  Forward if unavailable
  - Click the link on the phone number to set or change the number that calls will be forwarded to if your line is unavailable, for example because your phone is unplugged or has lost power.
-  Anonymous Callers
  - Set what should happen if you receive a call from an unknown number, for example reject the call.

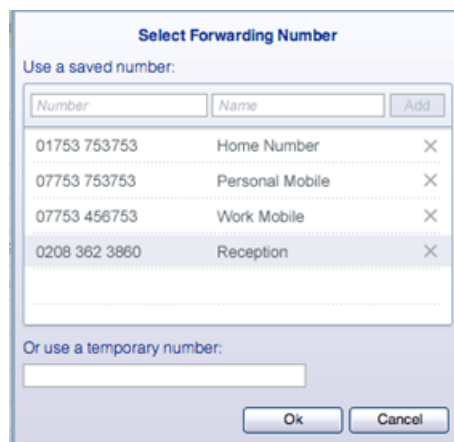
## 13.4 Selecting forwarding numbers and creating caller lists

Many settings in Business Call Manager allow you to create a list of callers or enter a call forwarding number. The interface for doing this will be the same for each service that you are configuring.

### 13.4.1 Selecting forwarding numbers

Many BCM settings require you to click a link to enter a call forwarding number. You can create a single list of call forwarding numbers that can then be used every time you want to configure a service that uses one of these numbers. The first time you click on one of these links, you will see a pop-up explaining the benefits of creating this forwarding number list.

**Figure 47: Select Forwarding Number**



Number	Name	Add
01753 753753	Home Number	X
07753 753753	Personal Mobile	X
07753 456753	Work Mobile	X
0208 362 3860	Reception	X

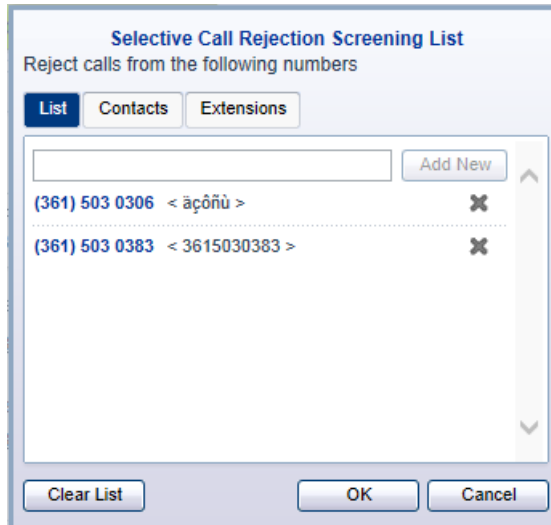
- To add a number, enter the Number and Name in the input boxes, and click Add.
- To delete a number from the list, click x alongside the entry.

- When configuring a call forwarding service, either select the number in the list that you want to use or enter a temporary number, and then click OK.

## 13.4.2 Creating caller lists

Many BCM settings require you to create a list of callers to whom the call forwarding behavior will apply. You will create a different list for each call service but the method of compiling the lists is the same for all services.

Figure 48: Caller List example



- You can add someone to a list by typing their number in the input box and clicking *Add New*.
  - If you know someone is in your contact list, you can simply enter their name or number in this input box to search for them in your Contacts. BCM will display matches as they occur.
- You can also select people directly from your Contact list.
- You will see the warning icon if you add a caller to a list and this will create interaction conflicts with other lists.
  - Click on the icon to see why there is an issue.
  - You can choose whether or not to resolve the issue, for example by deleting the contact from the conflicting list. However, if you do not resolve it, then unexpected call handling behavior may occur.

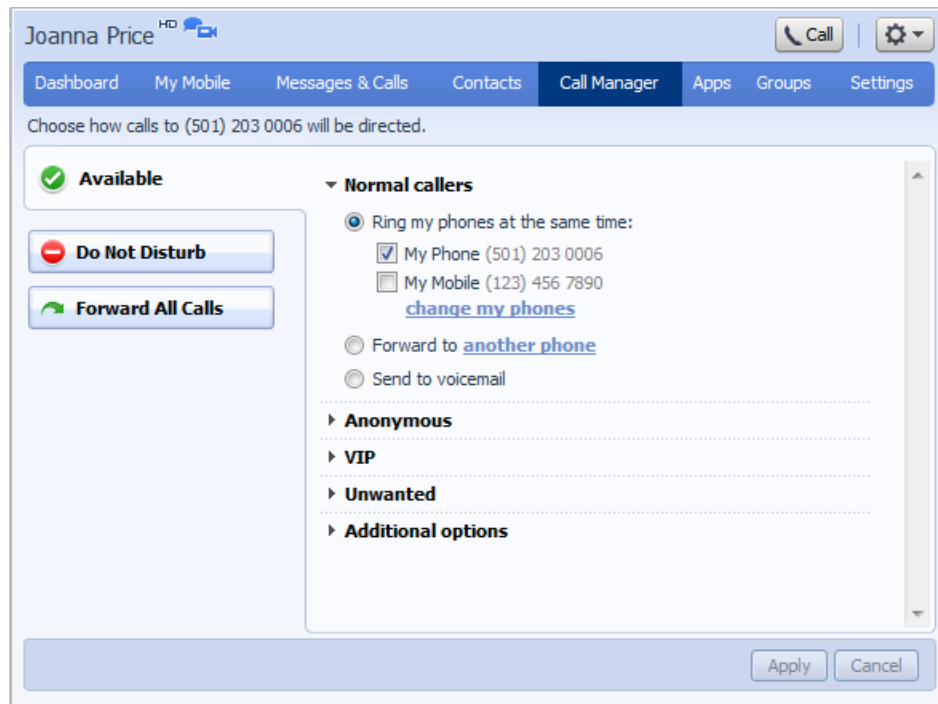
# 14 Easy Call Manager (ECM)

Accessed on the Call Manager tab, Easy Call Manager (ECM) is an easy-to-use call handling service, with a simple set of configurable profiles.

## 14.1 Available profile

The Available profile allows you to accept incoming calls and to configure your call handling options. For example, you may want your phone to ring as normal, or to receive calls simultaneously on a choice of phones to avoid missing a call. Additionally, you may want to apply special call handling rules for calls from specific numbers, for example, to screen calls from anonymous numbers, or to give priority to calls from VIP numbers and reject calls from unwanted numbers.

Figure 49: Available profile



### 14.1.1 Normal callers

You can choose from the following call handling options for calls from normal callers. Once you have made any changes, you should click *Apply* in the bottom right corner of the window to activate them.

#### Ring my phones at the same time

This allows you to have one or more phones ring for calls from normal callers. Your main phone number will be enabled by default. To add more phones, click on *add more phones*. The following popup will appear.

Figure 50: My Phones

Name	Number
My Phone	(112) 900 0005

You can now enter up to four other numbers that you want to ring. Each number must also have a name. You can remove a number by clicking on the Cross icon to the right of it. Once you have made your desired changes, click *OK* to apply them.

Each of your chosen numbers will now be listed under *Ring my phones at the same time*. Tick the boxes next to the phones that you want to ring for calls from normal callers.

#### Forward to another phone

This will forward all calls from normal callers to a phone number or contact of your choice. To set this number, click on *another phone*. In the Forwarding box that appears, enter the number or the name of your chosen contact and then click *OK*. You should then check the radio button to the left of the *Forward to option*.

#### Send to voicemail

This will send all calls from normal callers directly to voicemail. To enable this option, check the radio button next to it.

## 14.1.2 Anonymous callers

To view the available call handling options for anonymous callers, click on *Anonymous*. You can choose from the following options. Once you have made any changes, you should click *Apply* in the bottom right corner of the window to activate them.

### Handle like Normal callers

When this option is enabled, calls from anonymous callers will be handled in the same way that you currently have set for normal callers.

You can also choose to screen calls from anonymous callers by checking the box next to *Ask caller to say their name before I accept the call*. When this option is activated, anonymous callers will be prompted to record their name. Once they have given their name, your phone will then ring and the name will be played to you. You can then decide whether you want to take the call or reject it.

### Send to voicemail

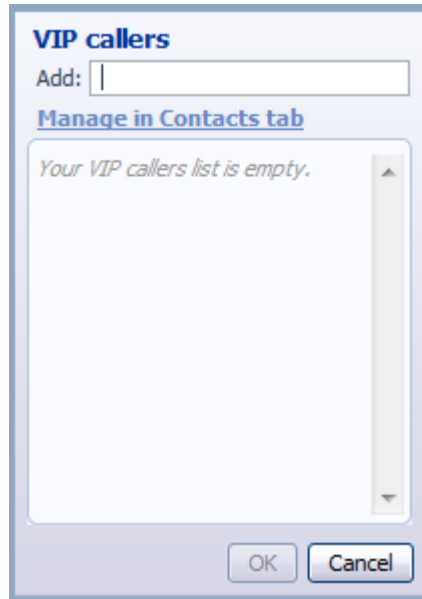
This will send all calls from anonymous callers directly to voicemail. To enable this option, check the radio button next to it.

### 14.1.3 VIP callers

The VIP section allows you to configure a group of priority callers and decide how calls from these contacts are routed. Once you have made any changes in this section, you should click *Apply* in the bottom right corner of the window to activate them.

To manage your list of VIP callers, expand the VIP section by clicking on *VIP* and then click on *Manage VIP callers*. The following box will appear.

**Figure 51: VIP callers**



You can add a contact to this list by typing a name or number in the *Add* field. Suggestions from your contact list will be given as you type. Once your chosen contact appears, you can simply click on their name. If you type a number that is not currently assigned to a contact, you will be given the option of adding this number as a new contact. After clicking on the *New Contact* option, you will be given a popup to fill out with details of the new contact.

Once you have clicked on your chosen contact or filled out the necessary details to add a new contact, this contact will be added to your list of VIP callers.

You can also remove currently configured VIP callers by clicking on the Cross icon to the right of their name.

When you have made all of your desired changes to your VIP callers list, click *OK* to apply them.

You can choose from the following call handling options for your VIP callers.

### **Ring my phones at the same time**

This allows you to have one or more phones ring for calls from normal callers. Your main phone number will be enabled by default. To add more phones, click on *add more phones*. The *My Phones* popup will appear, as shown in Figure 50.

You can now enter up to four other numbers that you want to ring. Each number must also have a name. You can remove a number by clicking on the Cross icon to the right of it. Once you have made your desired changes, click *OK* to apply them.

Each of your chosen numbers will now be listed under *Ring my phones at the same time*. Tick the boxes next to the phones that you want to ring for calls from normal callers.

### **Forward to another phone**

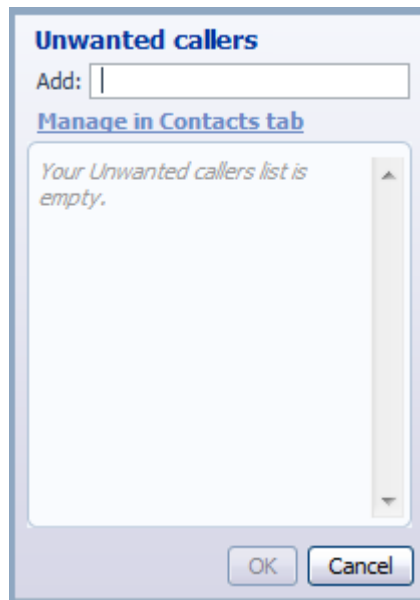
This will forward all calls from normal callers to a phone number or contact of your choice. To set this number, click on *another phone*. In the Forwarding box that appears, enter the number or the name of your chosen contact and then click *OK*. You should then check the radio button to the left of the *Forward to* option.

## 14.1.4 Unwanted callers

The Unwanted section allows you to configure a group of unwanted callers and decide how calls from these contacts are handled. Once you have made any changes in this section, you should click *Apply* in the bottom right corner of the window to activate them.

To manage your list of unwanted callers, expand the Unwanted section by clicking on *Unwanted* and then click on *Manage Unwanted callers*. The following box will appear.

**Figure 52: Unwanted callers**



You can add a contact to this list by typing a name or number in the *Add* field. Suggestions from your contact list will be given as you type. Once your chosen contact appears, you can simply click on their name. If you type a number that is not currently assigned to a contact, you will be given the option of adding this number as a new contact. After clicking on the *New Contact* option, you will be given a popup to fill out with details of the new contact.

Once you have clicked on your chosen contact or filled out the necessary details to add a new contact, this contact will be added to your list of unwanted callers.

You can also remove currently configured unwanted callers by clicking on the Cross icon to the right of their name.

When you have made all of your desired changes to your unwanted callers list, click *OK* to apply them.

You can choose from the following call handling options for these callers.

### **Reject**

This will reject all calls from unwanted callers. These calls will appear on the *Rejected* tab on the *Messages & Calls* screen described in Chapter 11.

### **Send to voicemail**

This will send all calls from unwanted callers directly to voicemail. To enable this option, check the radio button next to it.

## **14.1.5 Additional options**

If you have chosen the Ring my phones option for your normal or VIP callers, you can use the Additional options section to configure how a call from one of these callers will be handled if you do not answer or you are already in a call.

For both of these situations, you can choose to do the following.

### **Forward to another phone**

This will forward unanswered calls to a phone number or contact of your choice. To set this number, click on *another phone*. In the Forwarding box that appears, enter the number or the name of your chosen contact and then click *OK*. You should then check the radio button to the left of the *Forward to* option.

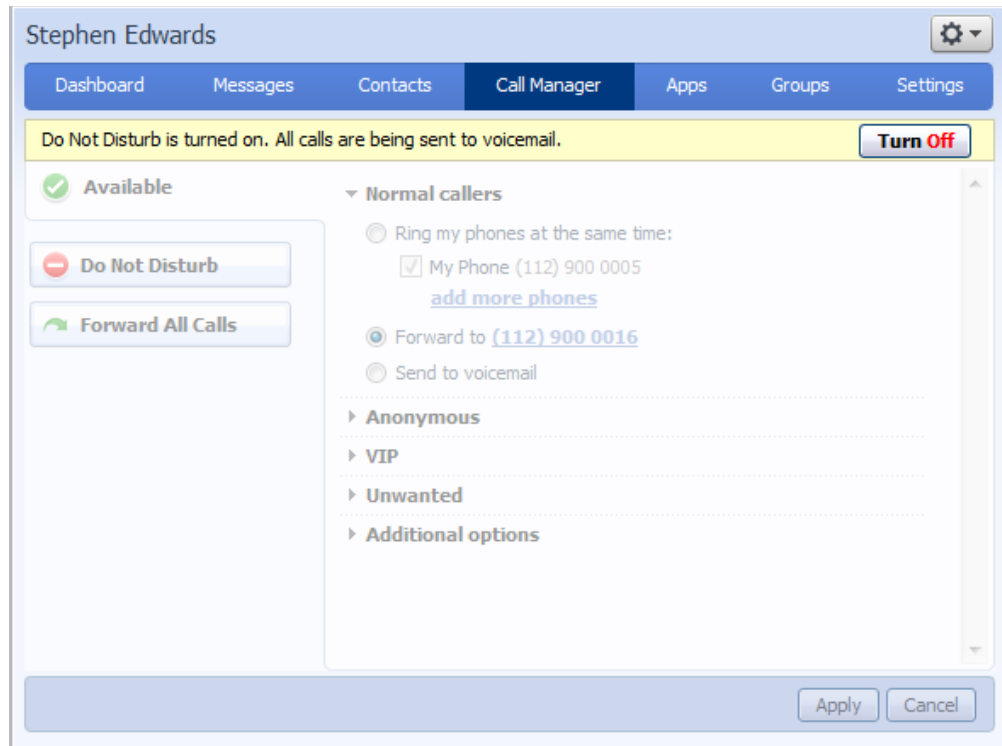
### **Send to voicemail**

This will send unanswered calls to voicemail. To enable this option, check the radio button next to it.

## 14.2 Do Not Disturb profile

The Do Not Disturb profile allows you to send all incoming calls directly to voicemail without ringing your phone. To activate the Do Not Disturb profile, click the *Do Not Disturb* button on the left hand side of the *Call Manager* tab.

Figure 53: Do Not Disturb profile



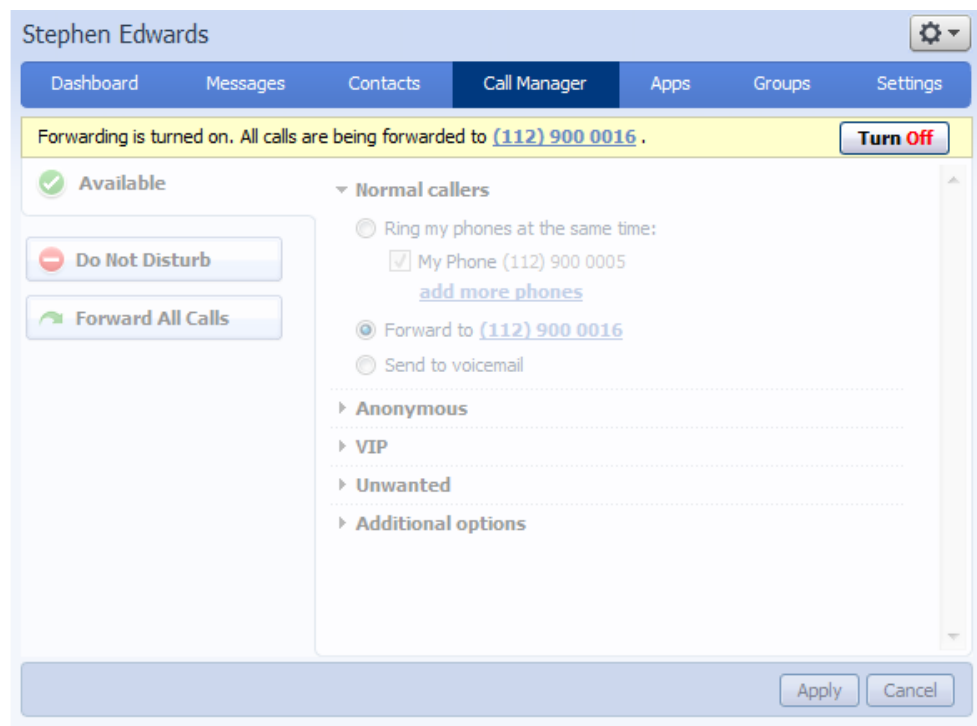
To turn the Do Not Disturb profile off again, click the *Turn Off* button in the top right hand corner of the *Call Manager* tab. You will not be able to make any changes in the *Call Manager* tab while the Do Not Disturb profile is turned on.

## 14.3 Forward All Calls profile

The Forward All Calls profile will forward all incoming calls to the phone number of your choice.

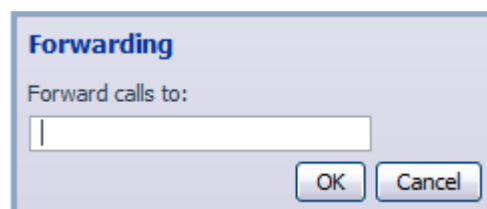
To activate the Forward All Calls profile, click on the *Forward All Calls* button on the left hand side of the *Call Manager* tab. If you have already configured a forwarding number using the Available profile, the Forward All Calls profile is activated and will forward calls to this number. A yellow bar will appear at the top of the Call Manager tab to inform you where calls are being forwarded to. If you want to change this number, simply click on it.

**Figure 54: Forward All Calls profile**



If you have not already configured a forwarding number using the Available profile or you have decided to change the pre-configured number, you will see the following pop-up.

**Figure 55: Forwarding**



Enter the number or the name of the contact that you want to forward calls to and then click **OK**. The Forward All Calls profile will then be activated and will forward all calls to this new number.

To turn the Forward All Calls profile off again, click the *Turn Off* button in the top right hand corner of the Call Manager tab. You will not be able to make any changes in the *Call Manager* tab while the Forward All Calls profile is turned on.

# 15 Incoming Call Manager (ICM)

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

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

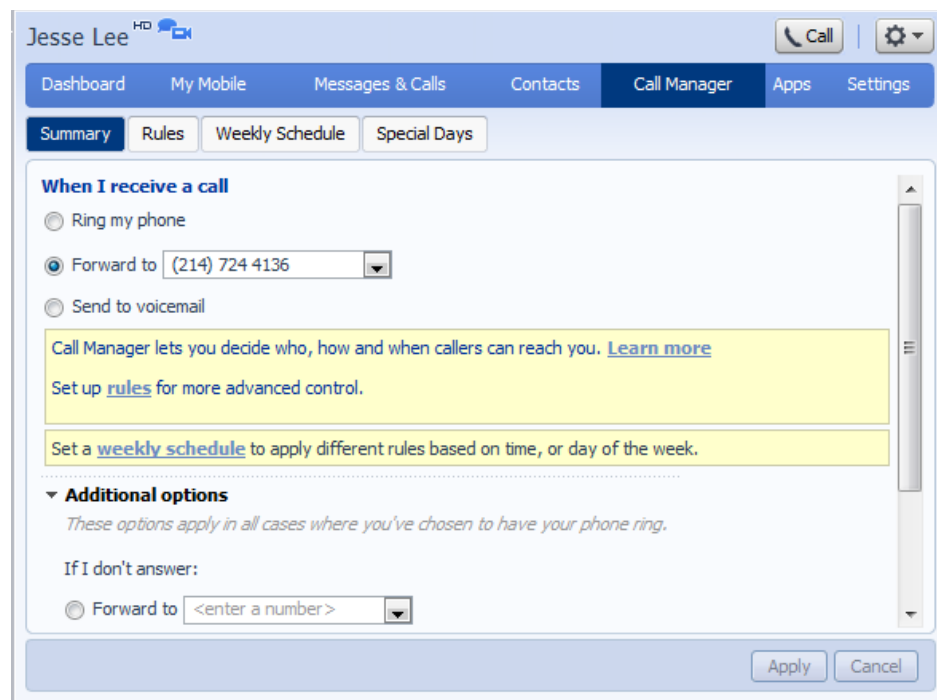
- Summary gives you a description of what will happen to incoming calls.
- Rules allows you to view and change your Call Forwarding settings.
- Follow Me lets you view and set up an advanced Find Me Follow Me service.
- Screening lets you screen different types of incoming calls.

Each of these sections is described in more detail below.

## 15.1 Summary

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

Figure 56: CommPortal Incoming Call Manager summary page



## 15.2 Rules based routing

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

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

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

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

**Figure 57: Adding a new rule**

**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:

- This individual contact - Apply to individual contact (in your contact directory)
- This group of contacts - Apply to a group of contacts as defined in my contact directory.

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

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

**Figure 58: Adding a new rule**

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

When I receive a call from anyone in my business group

- have my phone ring using
- 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

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

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

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

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

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

**Figure 59: Adding a new rule**

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

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

Seconds into call:	0	30	60	90	120	
<b>My Phone</b> <b>(214) 555 1212</b>	▶▶	▶▶				🗑️

Phone Number:  Start:  End:

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

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

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

7. Click *Finish*.

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

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

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

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

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

Figure 60: Incoming Call Manager – Rules tab

The screenshot shows a configuration window titled "When no rules apply in the 'Normal' set of rules". Below the title, the text "When no rules apply" is displayed. There are seven radio button options for handling calls when no rules apply:

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

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

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

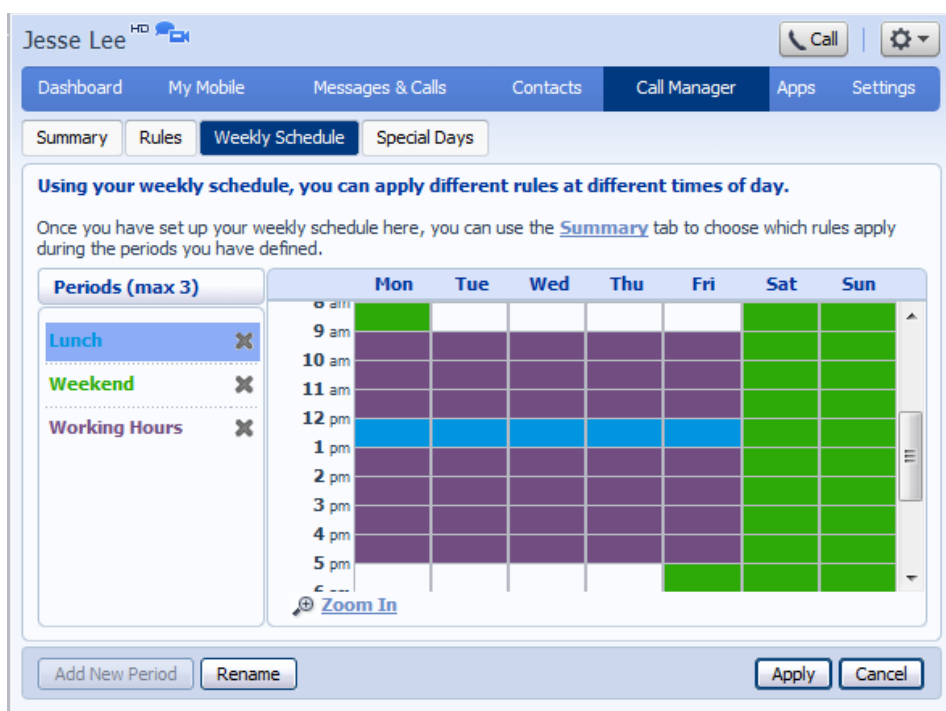
## 15.3 Schedule based routing

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

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

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

**Figure 61: Incoming Call Manager – Weekly Schedule tab**

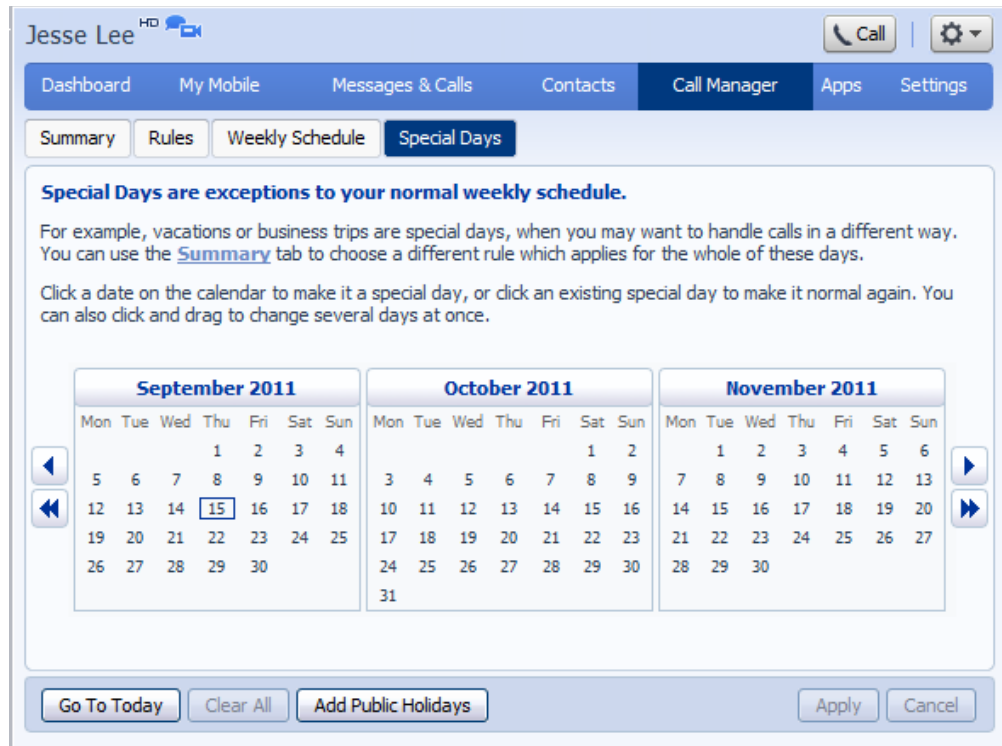


1. Select the period that you want to modify.
2. Using your mouse, point to the day and time you want to change and click the mouse. To change multiple time periods, left click and hold the mouse button and drag across the days and time periods you wish to change.
3. To rename a period, click the rename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



## 15.4 Special days (holidays)

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

Figure 62: Incoming Call Manager – Special Days tab



To select individual special days:

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

To have the system automatically define public holidays:

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

# 16 Groups

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

Figure 63: CommPortal Groups page



There are a number of different types of groups:

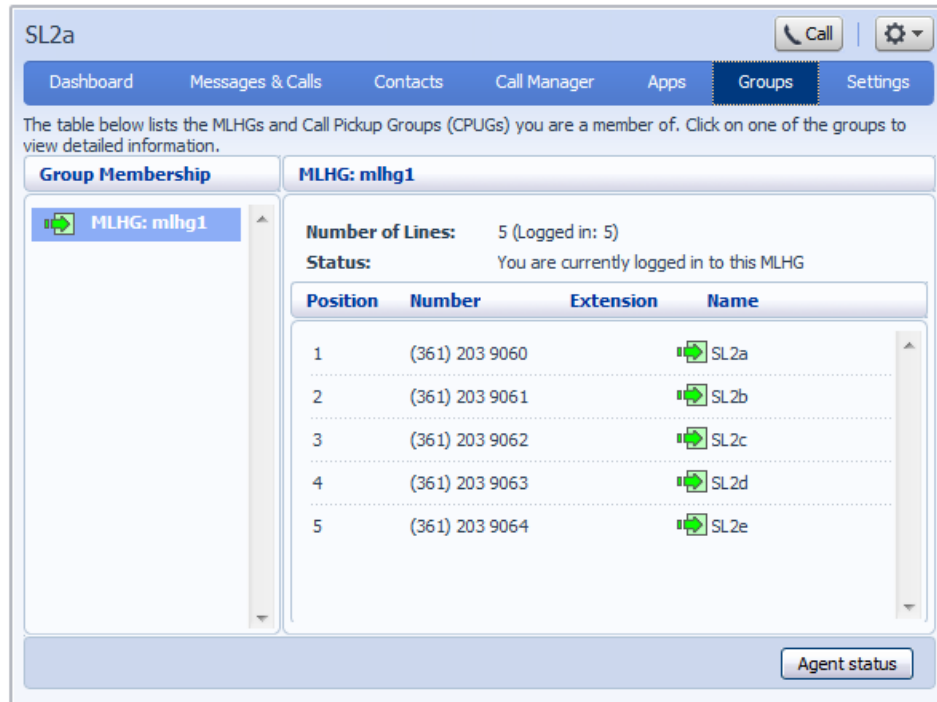
- **Multi Line Hunt Group.** When a call comes in to a Multi Line Hunt Group, each line in the group is rung in turn until someone answers the call. Depending on how your administrator has set up your Multi Line Hunt Group you may be able to log in and out of the Multi Line Hunt Group. When you're logged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

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

Figure 64: Groups – Multi Line Hunt Groups



The following information is shown:

- What department this Multi Line Hunt Group is in, if any. If your business does not use departments then this will say None.
- How many lines are in the group, and how many are logged in.
- Whether you are currently logged in.
- Details of each of the lines in this group and whether each line is currently logged in. Your line will be in this list.
- If you have the Integrated ACD feature enabled, you will see an *Agent Status* button at the bottom right of the screen that you can click to access the Agent Status page described in 16.1.3.

### 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

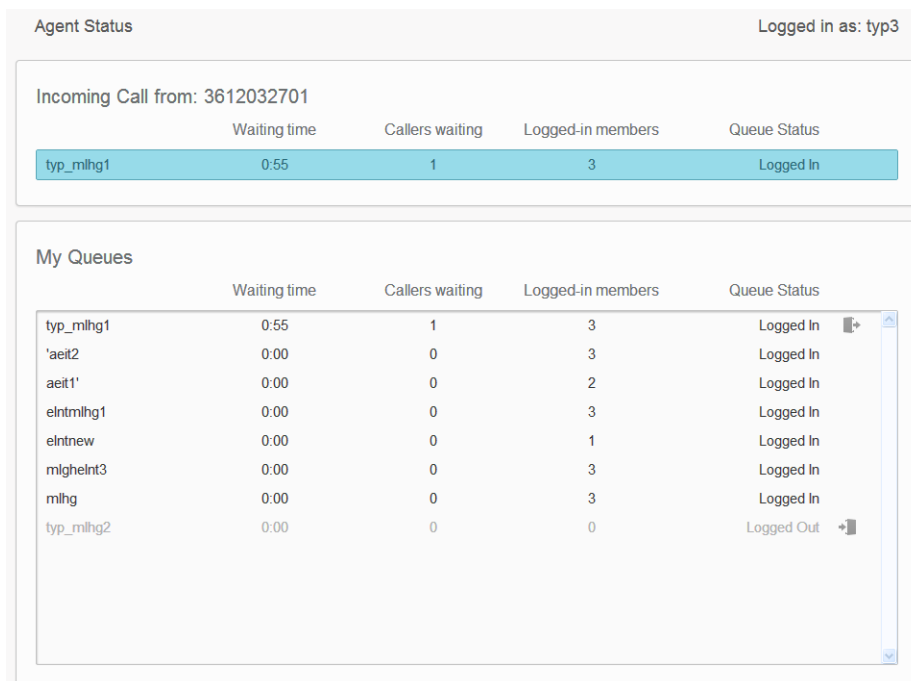
To log into the Multi Line Hunt Group using CommPortal click on *Login*. Your line will be marked in the list with: 

To log into the Multi Line Hunt Group using CommPortal click on *Logout*. Your line will be marked in the list with: 

## 16.1.3 Using the Agent Status screen

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



Figure 65: Integrated ACD Agent status screen



The screenshot shows the 'Agent Status' interface. At the top right, it says 'Logged in as: typ3'. Below this, there is a section for an 'Incoming Call from: 3612032701'. This section contains a table with the following data:

	Waiting time	Callers waiting	Logged-in members	Queue Status
typ_mlhg1	0:55	1	3	Logged In

Below the incoming call section is a 'My Queues' section, which contains a larger table with the following data:

	Waiting time	Callers waiting	Logged-in members	Queue Status
typ_mlhg1	0:55	1	3	Logged In 
'aeit2	0:00	0	3	Logged In
aeit1'	0:00	0	2	Logged In
eIntrmlhg1	0:00	0	3	Logged In
eIntrnew	0:00	0	1	Logged In
mlgheint3	0:00	0	3	Logged In
mlhg	0:00	0	3	Logged In
typ_mlhg2	0:00	0	0	Logged Out 

This screen

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

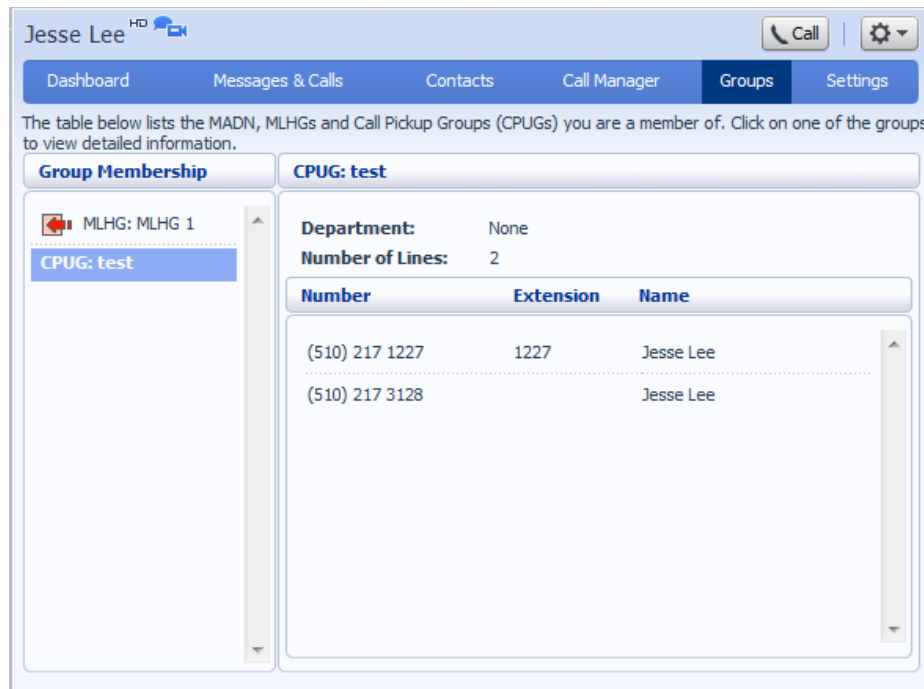
For more information on using Integrated ACD, please see the *Integrated ACD End User Guide*.

## 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:

Figure 66: Groups – Call Pickup Groups



The following information is shown:

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

## 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.

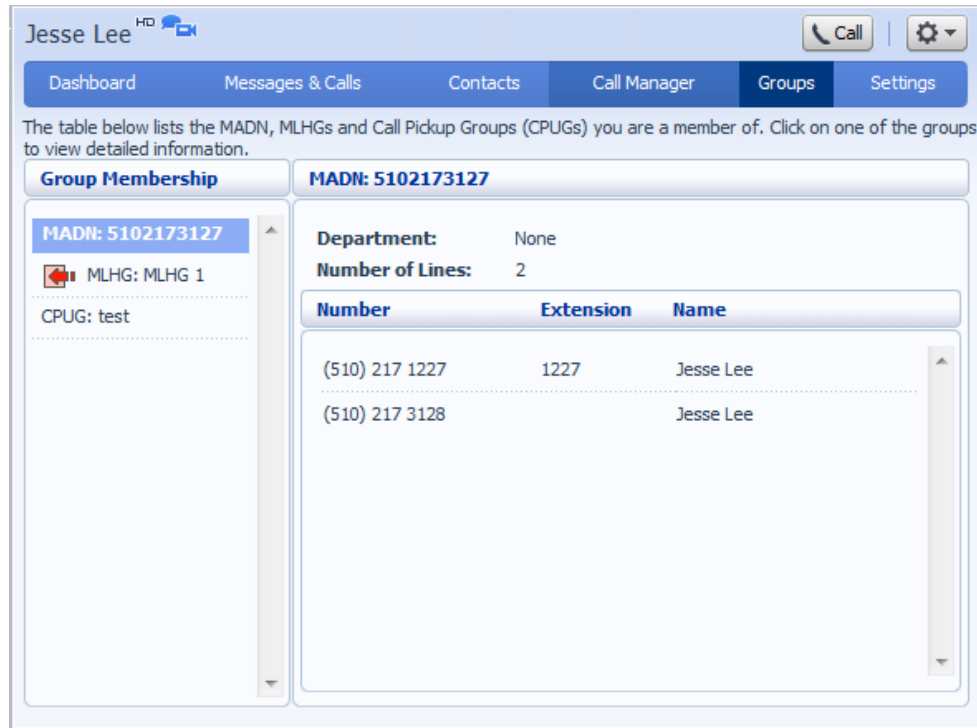
Alternatively, if two or more phones are ringing and you want to pick up the call that is ringing on a particular extension number, follow these steps:

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:

Figure 67: Contacts: Multiple Appearance Directory Numbers



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.

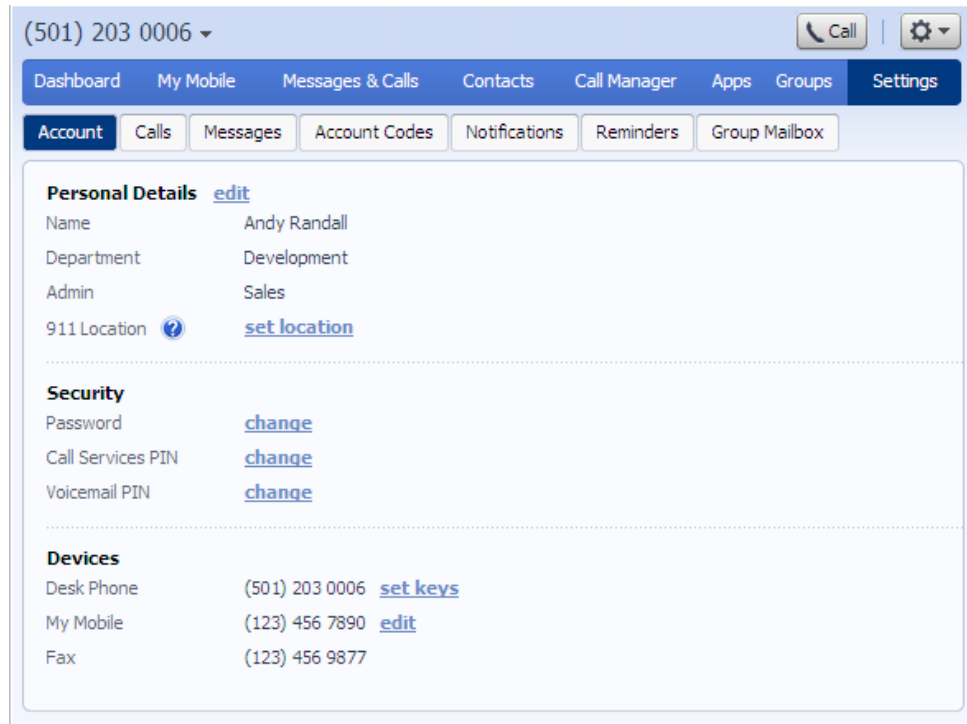
Only an administrator can make changes to a Multiple Appearance Directory Number group.



# 17 Settings

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

**Figure 68: CommPortal Settings page**

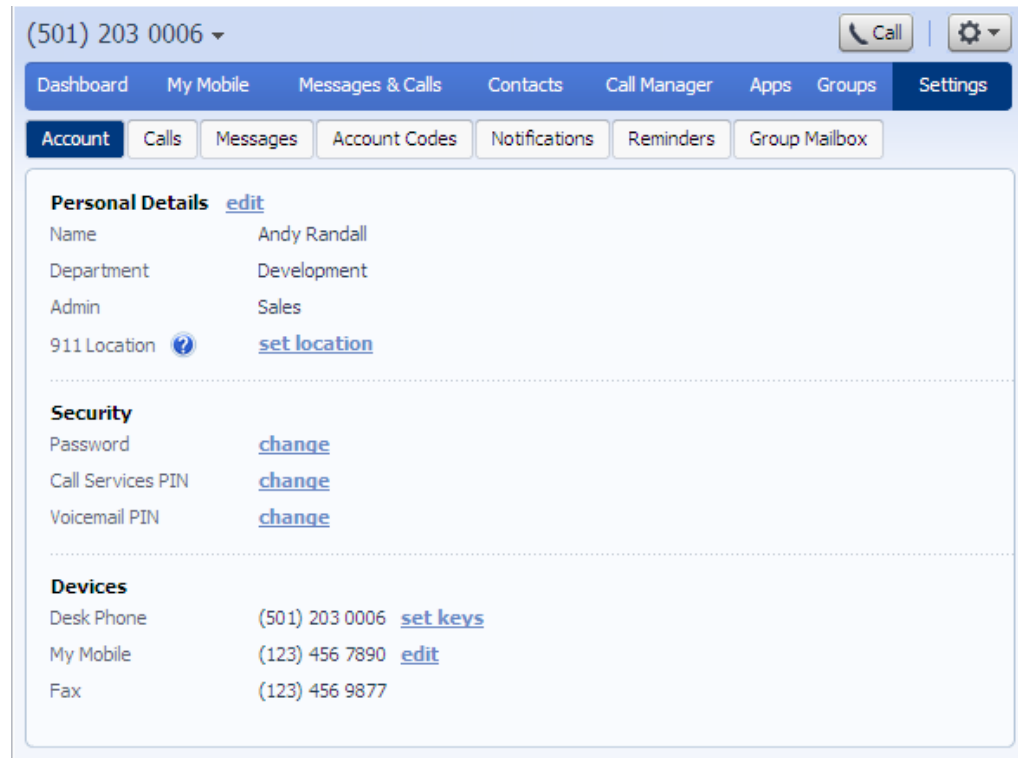


- Account allows you to configure and change some of the settings for your account.
- Calls allows you to configure your call service options.
- Messages allows you to configure your messaging settings.
- Account Codes lets you set up your account codes, if you have appropriate permissions.
- Notifications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

## 17.1 Account

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

Figure 69: Settings - Account tab



The page is divided into the following panels.

### Personal Details

The Personal Details panel shows you information about your line:

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

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

## Security

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

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

To change your CommPortal password, follow these steps:

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

You have two different PINs.

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

To change either of these PINs, follow these steps:

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

## Devices

The Devices panel shows you the phones and other devices that you currently have configured for your account. If you have a SIP desk phone, you can use the Devices panel to configure settings for it by clicking on *set keys* next to its number. This will launch the Phone Configurator, which is described in Chapter 19.

## 17.2 Calls

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

Figure 70: Settings - Calls tab

(501) 203 0006 ▾

Call | ⚙

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

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

▼ **General**

Auto-answer my phone for click-to-dial calls

Call transfer number

Allow callers to send numeric pages

Withhold caller ID when making calls

If not withheld, signal my name as:

Display caller name for incoming calls

Display caller number for incoming calls

▶ **Call Forwarding**

▶ **Call Blocking**

▼ **Call Jump**

Enter phone numbers you may want to transfer calls to.

Alternate

Apply Cancel

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

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

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

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

To block certain types of call, follow these steps:

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

To unblock a type of call, follow these steps:

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

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

### **Call Jump**

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

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

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

### **Call Me Buttons**

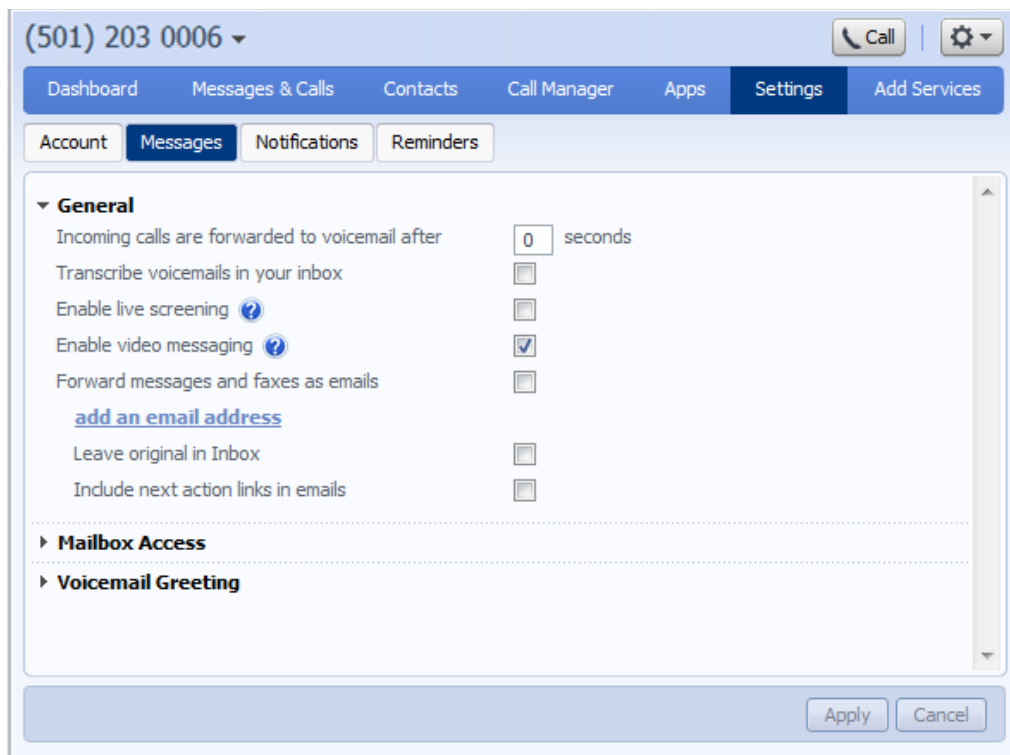
The Call Me Buttons panel allows you to enable or disable your Call Me service and to cancel your existing buttons. If you disable the buttons by un-checking the *Enable Call Me Buttons* checkbox, potential callers who attempt to call you, for example by using a Call Me button that you had already included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

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

## 17.3 Messages

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

Figure 71: Settings - Messages tab



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

### General

You can use the General panel to do the following.

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

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

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

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

### **Mailbox Access**

You can use the Mailbox Access panel to:

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

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

### **Voicemail Greeting**

You can use the Voicemail Greeting panel to:

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

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

## 17.4 Account Codes

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

Figure 72: Settings - Account Codes tab

Stephen Edwards

Dashboard Messages Contacts Call Manager Apps Groups Settings

Account Calls Messages Account Codes Notifications

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

Personal Business Group

You have no personal account codes assigned.

Account Code Options

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:

Max incorrect attempts before account is blocked:

Unlock Account Codes

Edit Personal Account Codes Apply Cancel

For more details on the account codes services, see section 8.4 or speak to your administrator.

### 17.4.1 Account code options

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

Figure 73: Account Code Options

**Account Code Options**

**Call types requiring an account code**

<input type="checkbox"/> Local	<input checked="" type="checkbox"/> Operator
<input checked="" type="checkbox"/> Regional	<input checked="" type="checkbox"/> Directory
<input checked="" type="checkbox"/> National	<input checked="" type="checkbox"/> Carrier Dialed
<input checked="" type="checkbox"/> International	<input type="checkbox"/> Local Business Group
<input checked="" type="checkbox"/> Premium Rate	<input type="checkbox"/> Other Business Group

Use validated account codes

Account code length:

Max incorrect attempts before account is blocked:

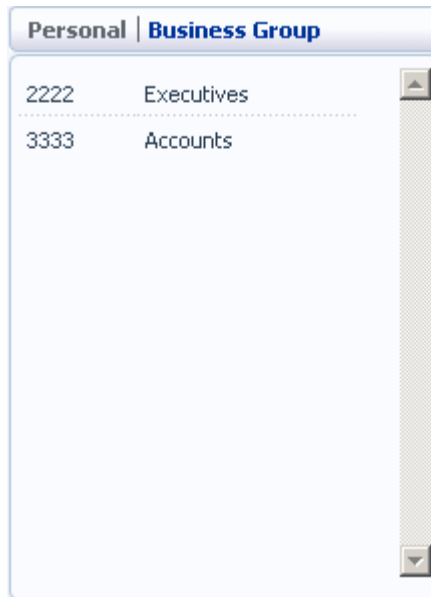
[Unblock Account Codes](#)

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

## 17.4.2 Business account codes

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

Figure 74: Business account codes



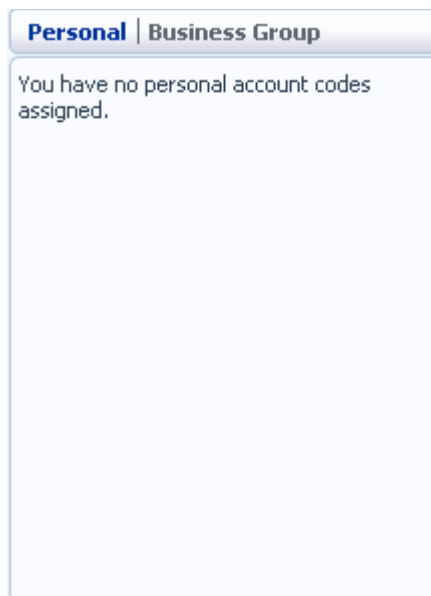
The screenshot shows a web interface with two tabs: 'Personal' and 'Business Group'. The 'Business Group' tab is selected. Below the tabs is a table with two rows of account codes. The first row has the code '2222' and the label 'Executives'. The second row has the code '3333' and the label 'Accounts'. A vertical scrollbar is visible on the right side of the table.

Account Code	Label
2222	Executives
3333	Accounts

## 17.4.3 Personal account codes

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

Figure 75: Personal account codes



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

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

**Figure 76: Editing personal account codes**

**Manage Assigned Account Codes**

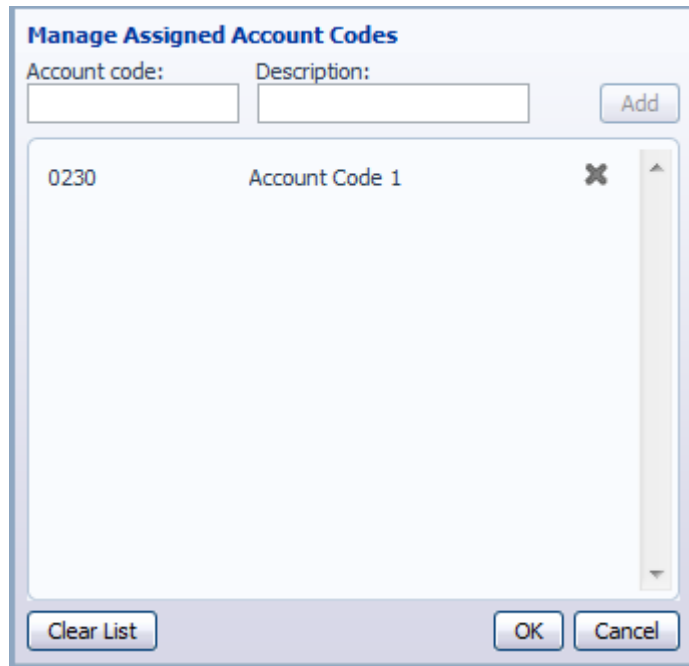
Account code:  Description:

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 code in the *Description* text box.
3. Click on *Add*.
4. Click on *OK*.
5. Click on *Apply*.

Figure 77: Adding an account code



To delete an account code, follow these steps:

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

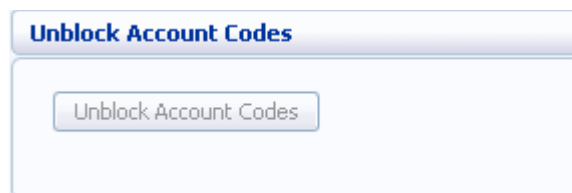
Alternatively, to delete all of your account codes, follow these steps:

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

#### 17.4.4 Unblocking account codes

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

Figure 78: Unblock Account Codes



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

## 17.5 Notifications

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

Figure 79: Settings - Notifications tab

(501) 203 0006 ▾ Call Settings

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

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

MWI | Email | Pager | Outdial | Override

Send phone notification of incoming messages to the following phone numbers

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

Clear List New Entry Apply Cancel

## MWI tab

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

**Figure 80: Messaging Settings – MWI Tab**

(501) 203 0006 ▾ Call Settings

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

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

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

Send phone notification of incoming messages to the following phone numbers

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

Clear List New Entry Apply Cancel

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

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

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

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

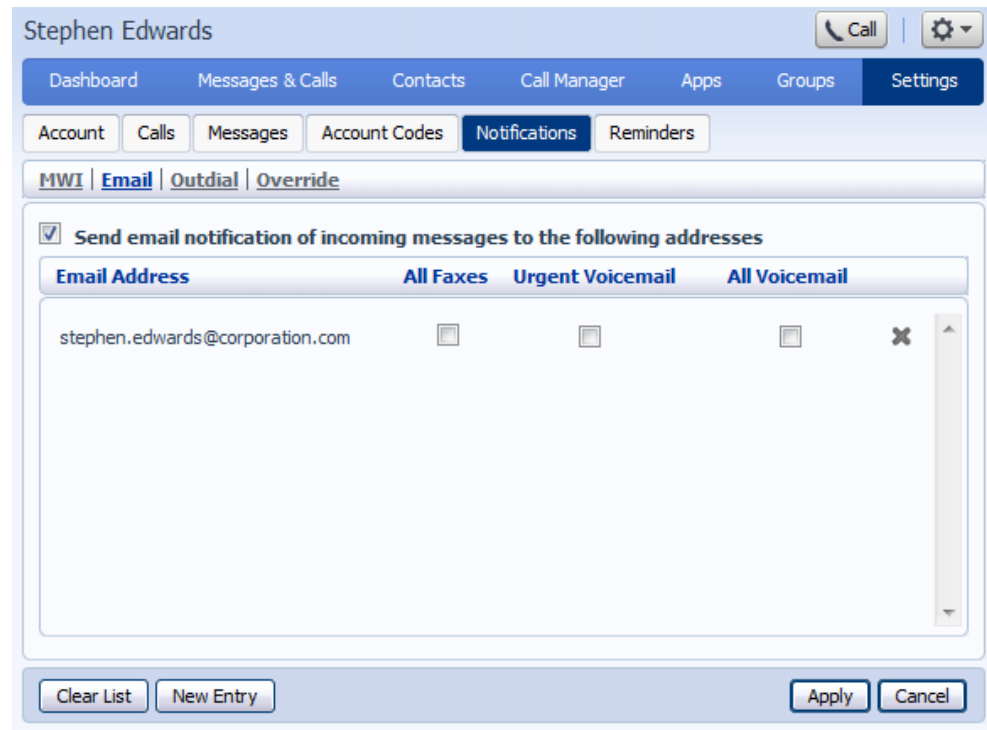
To have only urgent new voice messages activate your phone's messages indicator, follow these steps:

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

## Email tab

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

**Figure 81: Notification settings - Email tab**



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

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

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

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

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

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

## Pager tab

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

**Figure 82: Pager Notifications**

Joanna Price Call Settings

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

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

MWI Email **Pager** Outdial Override

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

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

New Entry Apply Cancel

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

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

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

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

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

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

### Outdial tab

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

**Figure 83: Outdial Notifications**

(501) 203 0006 ▾ Call ⚙

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

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

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

**Send outdial notification of incoming messages, according to the [schedule](#):**

Specify the phone number to send outdial notifications to: (689) 563 2587

Choose the incoming messages that should be notified to the specified phone number:

Urgent Voicemail  All Voicemail  All Faxes

Set the delay between receiving the message and receiving the notification for the message:

Delay for normal messages: 4 hours ▾ Delay for urgent messages: 8 hours ▾

Set a retry limit and delay between retry attempts until the message is marked as read:

Number of outdial retry attempts: 3  Stop retries when you answer the call

Delay between retries (minutes): 10  Stop retries only when you access your voicemail

Apply Cancel

Using this tab, you can:

- enable or disable the Outdial notifications by clicking the box on the left-hand side of the screen. When Outdial notifications are disabled, the rest of the screen will be grayed out and you will not be able to make any changes to the configuration without enabling Outdial notifications first.

- choose which events – Urgent Voicemails, All Voicemails and/or All Faxes – will trigger a notification to your chosen number
- enter or modify targets for notification types.

You can also

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

### Override tab

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

Figure 84: Notification settings - Override tab

The screenshot shows the 'Override' tab in a web-based notification settings interface. At the top, the user's name 'Stephen Edwards' is displayed. Below the name is a navigation bar with tabs for 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', 'Groups', and 'Settings'. Underneath this is another set of tabs: 'Account', 'Messages', 'Account Codes', 'Notifications', and 'Reminders'. The 'Notifications' tab is active, and within it, the 'Override' sub-tab is selected. The main content area contains the following settings:

- Override your outdial and pager notifications, sending them according to the schedule:**
- While the override profile is active, notify me by: **Outdial**      Expiry date: 12 / 27 / 2012 (month / day / year)
- Specify the phone number to send outdial notifications to: 1129000005
- Choose the incoming messages that should be notified to the specified phone number:
  - Urgent Voicemail       All Voicemail
- Set a retry limit and delay between retry attempts until the message is marked as read:
  - Number of outdial retry attempts: 3       Stop retries when you answer the call
  - Delay between retries (minutes): 15       Stop retries only when you access your voicemail

At the bottom right of the settings area are 'Apply' and 'Cancel' buttons.

Using the Override tab, you can

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

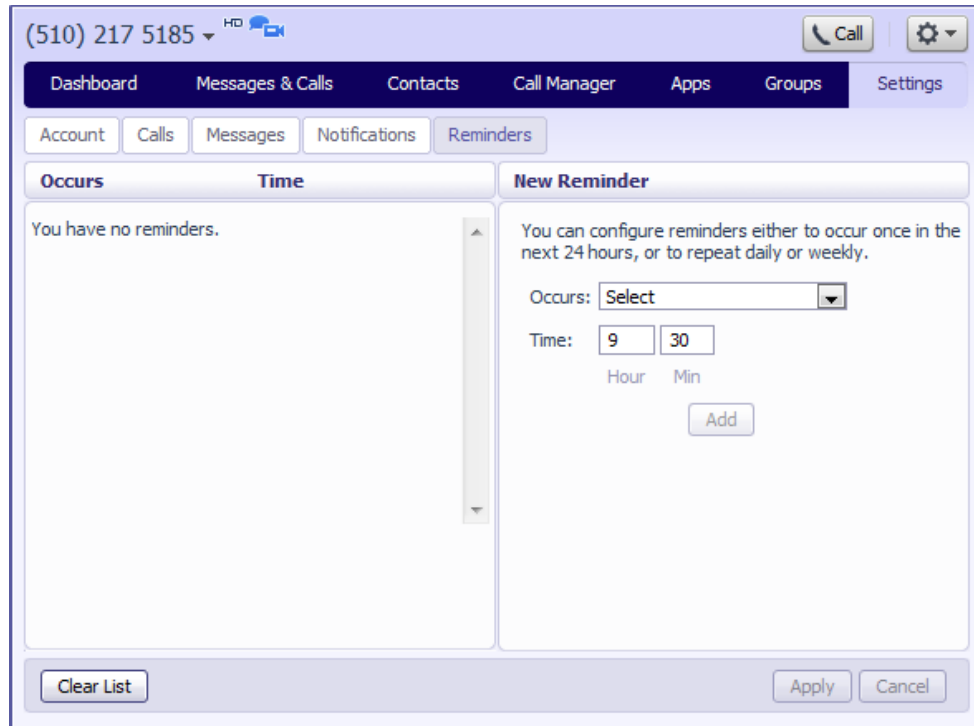
You can also

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

## 17.6 Reminders

The Reminders tab lets you set up reminder calls.

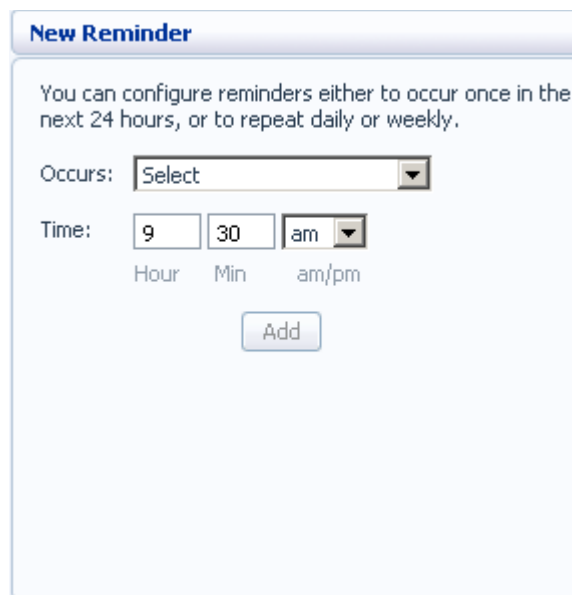
Figure 85: CommPortal Reminders page



### 17.6.1 Adding reminders

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

Figure 86: New Reminder section



To add a new reminder, follow these steps:

**Figure 87: Adding a new reminder**

**New Reminder**

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

Occurs:

Time:

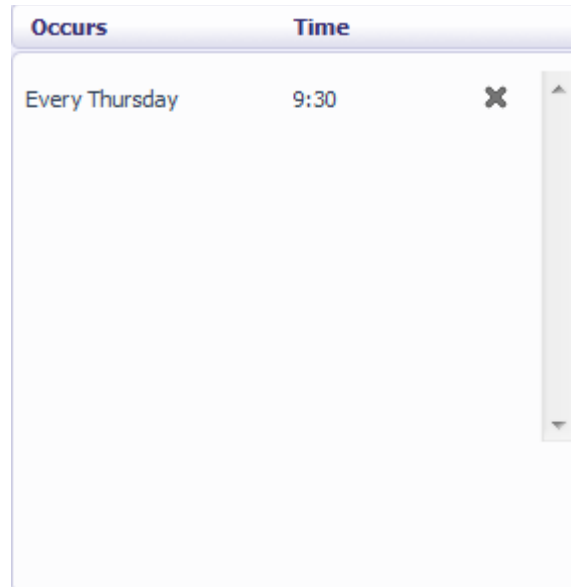
- Once only (next 24 hours)
- Every Monday
- Every Tuesday
- Every Wednesday
- Every Thursday
- Every Friday
- Every Saturday
- Every Sunday
- Every weekday
- Every day

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

## 17.6.2 Deleting reminders

To delete a reminder, you use the Reminders list:

**Figure 88: Deleting a reminder**



To delete a reminder, follow these steps:

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

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

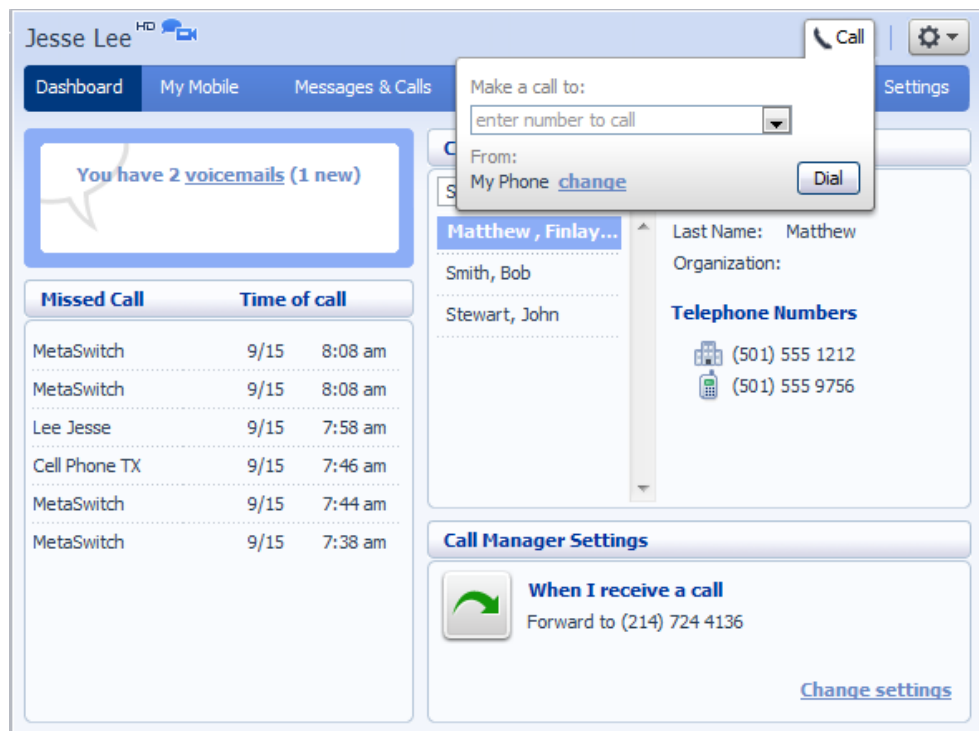
1. Click on *Clear List*.
2. Click on *Apply*.

# 18 Click To Dial

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

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

**Figure 89: Click To Dial Window**

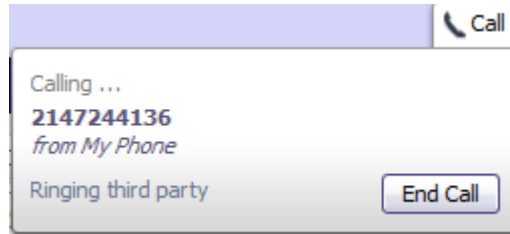


## 18.1 Calling from your regular phone

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.

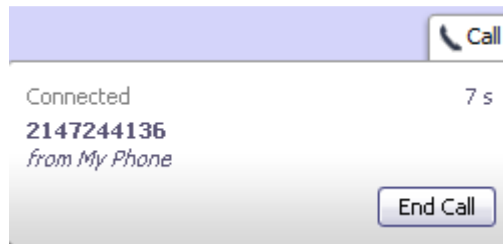
When you answer it the number you entered will be called.

**Figure 90: Click To Dial – Call in Progress**



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

**Figure 91: Click To Dial – Call Connected**



## 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 *Account* tab.
3. Under the *Devices* heading, click on the *set keys* 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 (built-in phones)

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

Figure 92: Phone Configurator graphical view



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

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

**Figure 93: Phone Configurator – Phone and Sidecar view**



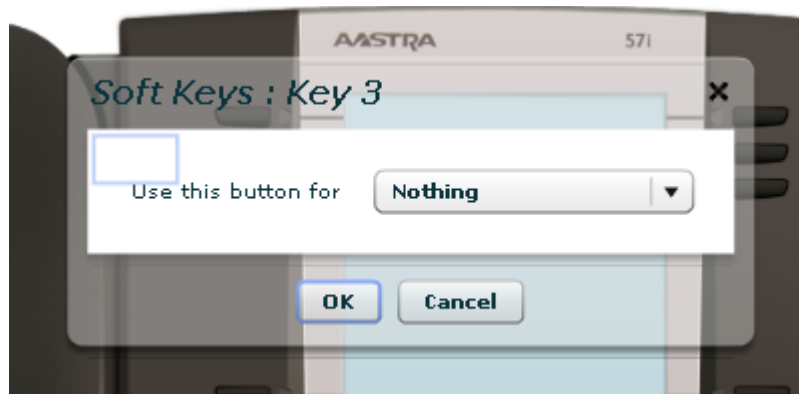
You can see whether you can modify a key by hovering your mouse over the key. If the key glows blue you can configure it. If it glows red, you cannot.

**Figure 94: Configurable key**



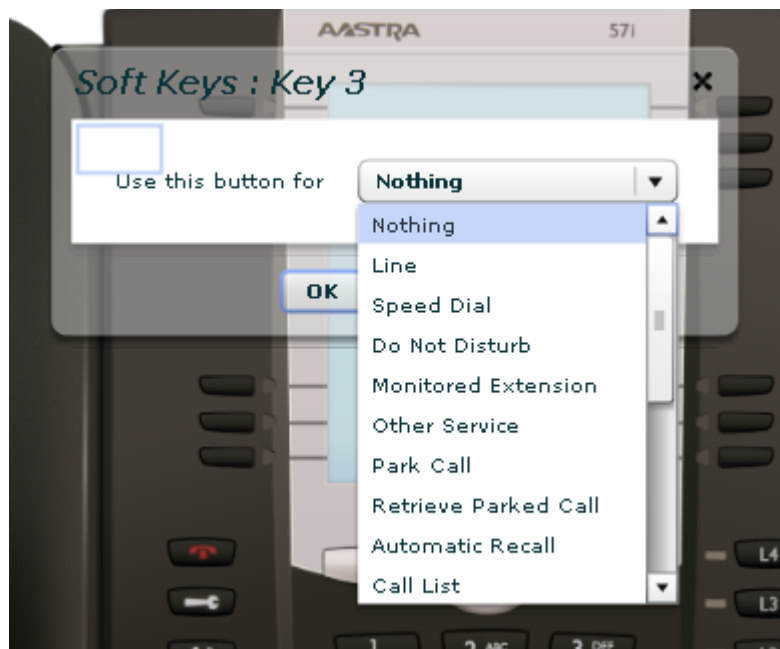
To select a key, click on it. This will launch a pop-up allowing you to configure the key:

Figure 95: Configuring a key



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

Figure 96: Configuring a key



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

- Nothing – this is used when a key is not assigned a function.
- Line – this key is used for your phone line. Pressing this key will cause the phone to go off-hook and ask you for digits to dial. When calls come into that phone line, this key can be used to answer those calls.
- Speed Dial – this configures the key as a speed dial 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.
- 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.
- Services – this configures the key to provide to access to services configured on your phone.
- Voicemail – this configures the key as a speed dial to access your Voicemail.
- Last Caller ID Erasure – this configures the key as a speed dial to call the access code which clears the network list of your recent calls.
- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.
- Trace Call – this configures the key as a speed dial to call the Call Trace service.
- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.
- Group Pickup – this configures the key as a speed dial for the Group Pickup service, described in Section 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.

**Figure 97: Configured key with label**



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

### 19.1.1 Pages of keys (built-in phones)


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

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

**Figure 98: Page of Keys**



## 19.2 Table view (built-in phones)

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

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 *The Aero Group Hosted Phone Solution Administrator Guide*.

## 19.3 Using the Phone Configurator (Endpoint Pack)

Once you have launched the Phone Configurator you will be presented with an image of your phone on the left and the configurable keys on the right.

**Figure 99: Modifying a phone profile**



The examples shown in this document show a Polycom SoundPoint IP450. Your phone model may differ from the one shown.

- Click the arrows alongside the headings in bold to expand the menus and expose the keys that can be configured.
- Use the drop-down menus alongside each key to select the function that you want to add to this key.
- For some phone models, some settings may be grouped together into 'hotspots', which allow you to display only the keys within the hotspot in the panel on the right hand side of the screen.
  - Hover your mouse over the phone image to see if there are any hotspots.

- If a hotspot appears, click on it to access the settings for these keys.
- Click on another region of the phone image to restore the full list of settings on the right-hand side.

The possible options that you may be able to configure for the keys on your phone are as follows (although not all of these options may be enabled on your phone system):

- None – 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.
- 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 configures 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.
- Services – this configures the key to provide access to services configured on your phone.
- Voicemail – this configures the key as a speed dial to access your Voicemail.
- Last Caller ID Erasure – this configures the key as a speed dial to call the access code which clears the network list of your recent calls.

- Automatic Callback – this configures the key as a speed dial to call the Automatic Callback service.
- Trace Call – this configures the key as a speed dial to call the Call Trace service.
- Line Identity – this configures the key as a speed dial to call the Line Identify service, which reads back your phone number.
- Group Pickup – this configures the key as a speed dial for the Group Pickup service, described in Section 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.

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.

# A Access codes

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

**Table 4: Access codes**

Immediate Call Forwarding Activation	<b>*72</b>
Immediate Call Forwarding Deactivation	<b>*73</b>
Busy Call Forwarding Activation	<b>*90</b>
Busy Call Forwarding Deactivation	<b>*91</b>
No Answer Call Forwarding Activation	<b>*92</b>
No Answer Call Forwarding Deactivation	<b>*93</b>
Park Call	<b>*13</b>
Retrieve Parked Call	<b>*14</b>
Do Not Disturb Activation	<b>*78</b>
Do Not Disturb Deactivation	<b>*79</b>
Automatic Recall	<b>*69</b>
Group Call Pickup	<b>*11</b>
Voicemail	<b>*86</b>



## B Quick reference information

**Table 5: Quick reference information**

Your phone number

Your extension

Code to dial an external number

Access your phone settings online

<https://commportal.myaerophone.com>

Conferencing phone number

Conferencing moderator code

Conferencing participant code

Conferencing moderator web access

Remote access to call forwarding  
number

Your administrator

Your administrator's phone number