

## ADMIN GUIDE



# CommPortal

Business Admin

Quick Guide to make changes to user accounts, create account & short codes, reset passwords, unlock user accounts, view call analytics etc.

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## INTRODUCTION

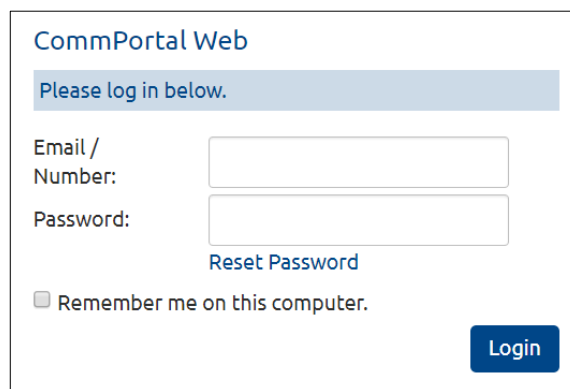
Welcome to Unified Communications! This guide is intended to get you up and running with the basic features associated with the product. .

As always, you can also contact our local customer care team at 800-860-2934 and we will be happy to assist you.

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

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

To get started, go to the login page at: <https://my.uc-view.com> (Contact your administrator regarding your 10 digit phone number and default password. Once you log in, you will be prompted to create a new password.)

A screenshot of the CommPortal Web login interface. The title "CommPortal Web" is at the top. Below it is a light blue box with the text "Please log in below." The form contains two input fields: "Email / Number:" and "Password:". Below the password field is a blue link "Reset Password". At the bottom left is a checkbox labeled "Remember me on this computer." and at the bottom right is a blue "Login" button.

CommPortal Web

Please log in below.

Email /  
Number:

Password:

[Reset Password](#)

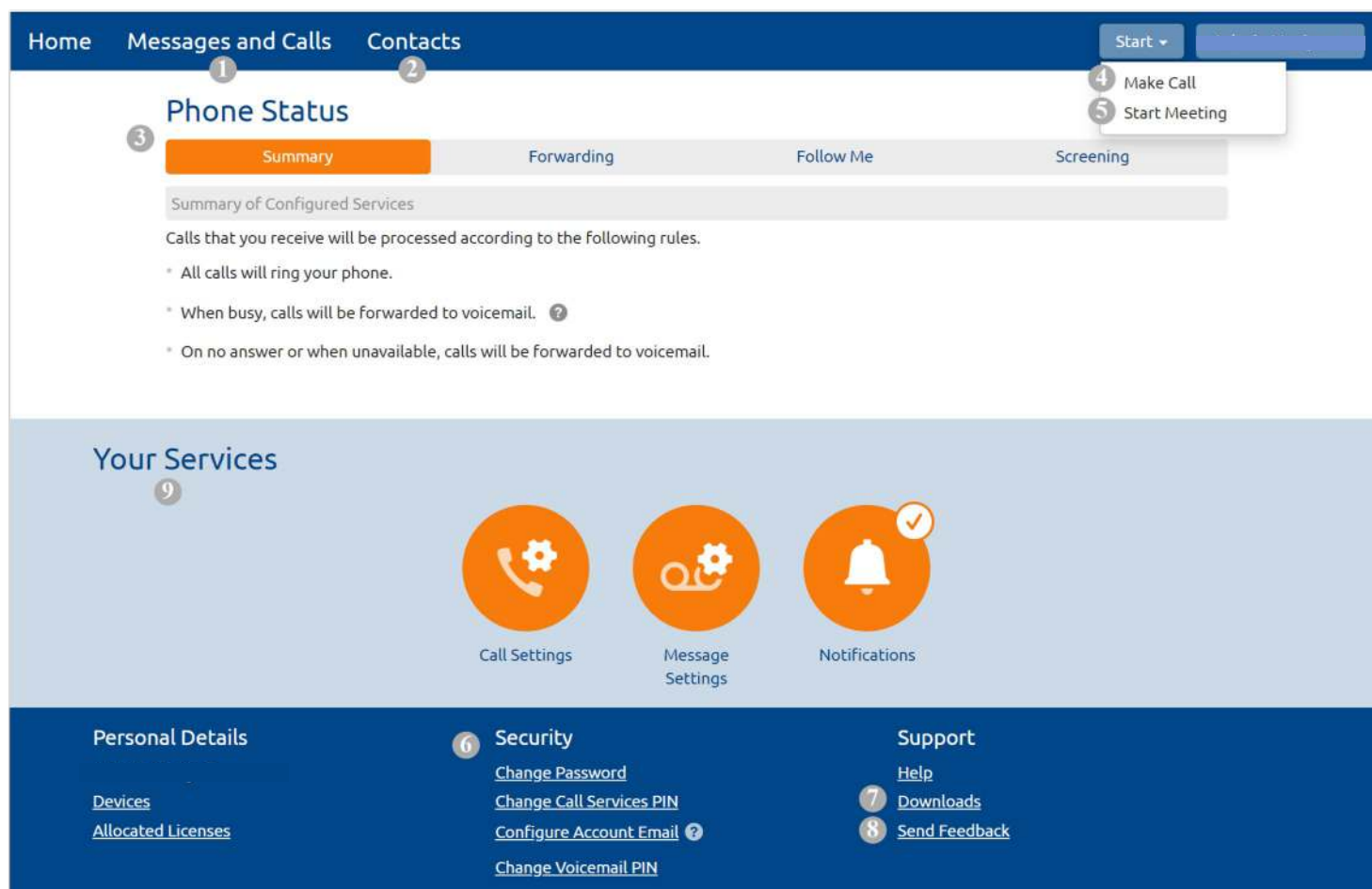
☐ Remember me on this computer.

Login

\* This Guide is representative and may vary from your individual CommPortal screen.

## GETTING ORIENTED

Once you are logged in, you will see Commportal Home Page:



The CommPortal Home page is the main screen for the portal where you can view your Call Manager settings and access a range of other services.

1. Messages and Calls – Click this link to view and retrieve any voicemails
2. Contacts – Import your contacts from Outlook or create new ones, click on a name to dial
3. Phone Status - Control your Call Manager settings
4. Make Call – Make a call direct from CommPortal
5. Start Meeting – Start an Accession Meeting (only available with certain licenses)

6. Security - Use these links to change your password or security email address
7. Downloads – Download apps, for example Accession Communicator
8. Send Feedback – Report bugs or make suggestions for improvements to the CommPortal interface
9. Your Services – Use these links to access a range of services available with your CommPortal account, for example to change your call, message and notification settings, or set up a Reminder call

## MESSAGES AND CALLS TOOLBAR

Home Messages and Calls (2) Contacts Start

Messages (2 New) Missed Dialed Received Deleted

New Voicemail Delete All

Message	Time	Actions
<p>▶ WIRELESS CALLER - (234)</p> <p>Hi this is test voicemail.</p>	Sun 8/18, 1:05 am, 7 secs	Actions ✕
<p>▶ WIRELESS CALLER - (234)</p> <p>Unable to transcribe. This failure has been reported.</p>	Sun 8/18, 1:03 am, 7 secs	Actions ✕

Home Messages and Calls (2) Contacts Start

Messages (2 New) Missed Dialed Received Deleted

Export

Message	Time	Actions
<p>▶ WIRELESS CALLER - (234)</p> <p>Hi this is test voicemail.</p>	Sun 8/18, 1:05 am	
<p>▶ WIRELESS CALLER - (234)</p> <p>Unable to transcribe. This failure has been reported.</p>	Sun 8/18, 1:03 am	
<p>WIRELESS CALLER - (234)</p>	Sun 8/18, 1:01 am	

Home Messages and Calls (2) Contacts Start

Messages (2 New) Missed Dialed Received Deleted


Export


Message	Time	Actions
WIRELESS CALLER - (234)	Sun 8/18, 1:04 am, 51 secs	
WIRELESS CALLER - (234)	Sun 8/18, 1:02 am, 50 secs	
WIRELESS CALLER - (234)	Sun 8/18, 1:01 am, 1 min	

The Messages and Calls tab displays all recent call activity. Here you can retrieve voicemails and view calls based on whether they were missed, received, dialed, or deleted.

Click on one of the sub-tabs to get more detail. From the Missed, Dialed, and Received tabs you can click on the name and either call them, add them to your contacts, or jump to the caller's existing contact information.

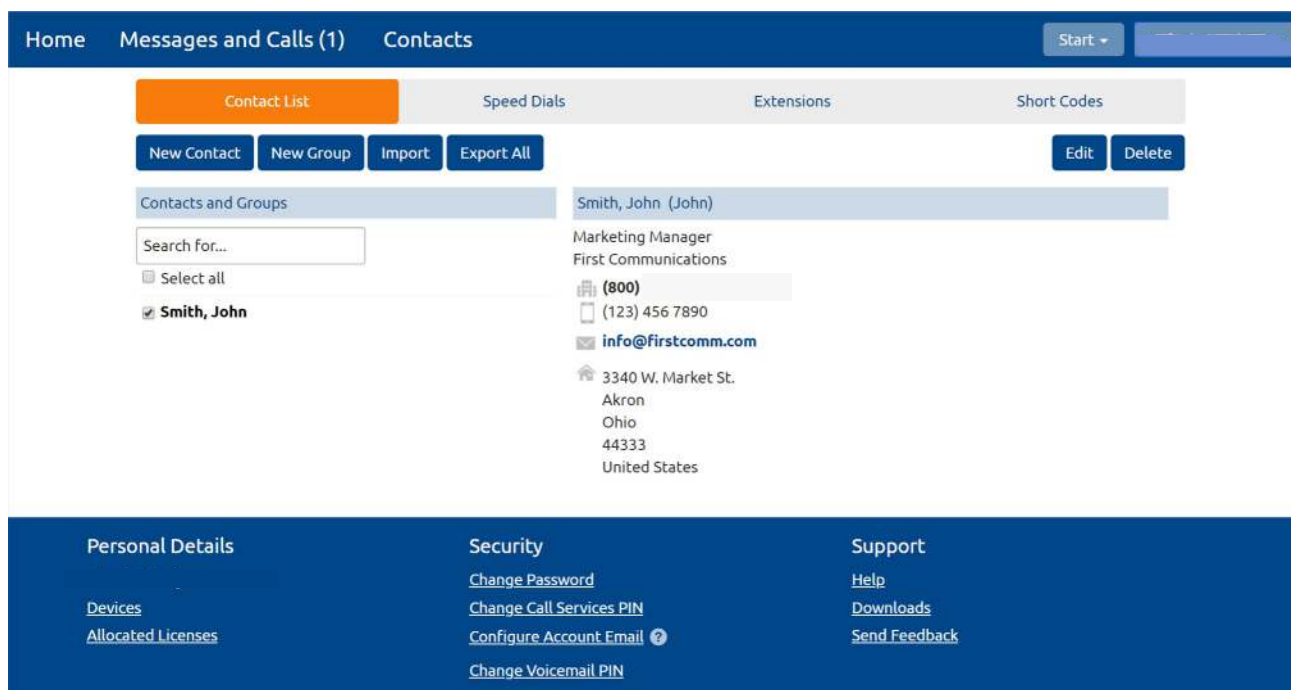
Use the Action drop-down alongside each message **Actions ▼** to mark as Heard (or) New, Forward as Email, or Forward as Voicemail, or click the trash icon to delete it.

Click the 'play' arrow button  to listen to a voicemail. Note that you can listen to your voicemails in any order. A window (as shown over the Messages and Calls screen) will open to display the Voicemail player where you can listen to and manage the message.

Click the 'New Voicemail' button  at the top of the page to record and leave a voicemail as a memo (your computer must have a microphone to use this function).

## CONTACTS TOOLBAR

The Contacts page enables you to manage all of your contact information. Within it, you can create new contacts (using recent call information like a missed call, or create a new one from scratch), create groups of contacts, or import/export your contacts.



The screenshot shows the CommPortal interface with the 'Contacts' tab selected. The top navigation bar includes 'Home', 'Messages and Calls (1)', and 'Contacts'. Below this, there's a 'Contact List' tab, and other tabs for 'Speed Dials', 'Extensions', and 'Short Codes'. A toolbar contains buttons for 'New Contact', 'New Group', 'Import', 'Export All', 'Edit', and 'Delete'. The main content area is divided into two sections: 'Contacts and Groups' on the left with a search bar and a list of contacts (including 'Smith, John' with a checkbox), and a detailed view of 'Smith, John (John)' on the right. This view includes his title 'Marketing Manager', company 'First Communications', phone number '(800) (123) 456 7890', email 'info@firstcomm.com', and address '3340 W. Market St., Akron, Ohio 44333, United States'. The bottom footer contains three columns of links: 'Personal Details' (Devices, Allocated Licenses), 'Security' (Change Password, Change Call Services PIN, Configure Account Email, Change Voicemail PIN), and 'Support' (Help, Downloads, Send Feedback).

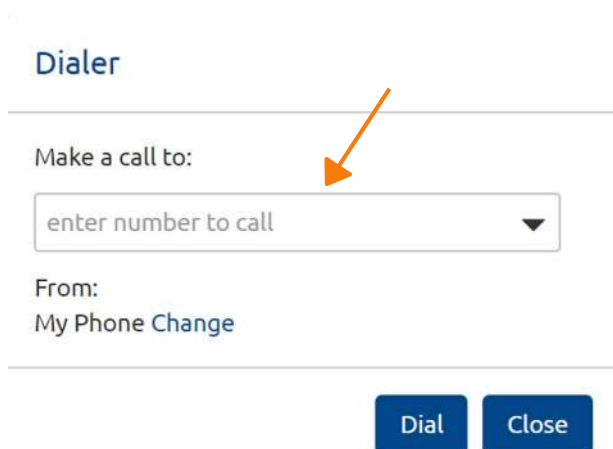
The fastest way to add your contacts is to import them from your email program. If you use Microsoft Outlook, follow these instructions:

- Open Outlook and go to the 'File' tab – then 'Import and Export'
- A new window should appear
- Select Export to File – click Next
- Select Comma Separated Values from the list and click "Next"
- Select Contacts from the folder tree and click "Next"
- Save exported file as 'Outlook Contacts' and click Next – save in a place you can easily locate such as the Desktop or My Documents
- Go back to the CommPortal Contacts page
- Click the Import button
- Click the Browse button to find the 'Outlook Contacts' file
- Click Import
- Your contacts are now in CommPortal

## MAKING CALLS FROM COMMPORTAL

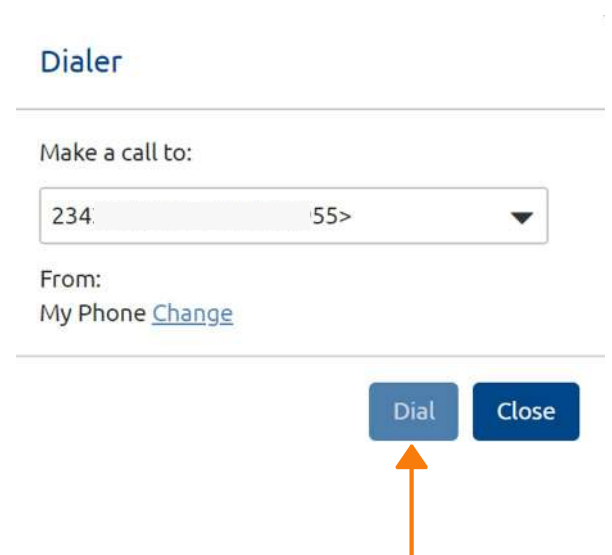
You can make a call direct from CommPortal by clicking Make Call to launch the Dialer. On the Dialer you can enter the number you want to call, either by typing it in or selecting from a dropdown list of your Contacts, and also choose which of your telephone numbers will be used to make the call.

### 1. Click on 'Make A Call'



The screenshot shows the 'Dialer' window with the title 'Dialer'. Below the title is a horizontal line. Underneath, the text 'Make a call to:' is followed by a dropdown menu. An orange arrow points to the dropdown menu. The dropdown menu is open, showing the text 'enter number to call' and a downward arrow. Below the dropdown menu, the text 'From:' is followed by 'My Phone' and a blue link 'Change'. At the bottom of the window, there are two blue buttons: 'Dial' and 'Close'.

### 2. Enter number and click 'Dial'



The screenshot shows the 'Dialer' window with the title 'Dialer'. Below the title is a horizontal line. Underneath, the text 'Make a call to:' is followed by a dropdown menu. The dropdown menu is open, showing the text '234' and '55>' and a downward arrow. Below the dropdown menu, the text 'From:' is followed by 'My Phone' and a blue link 'Change'. At the bottom of the window, there are two blue buttons: 'Dial' and 'Close'. An orange arrow points to the 'Dial' button.



## CALL FORWARDING

You can change settings of the following call forwarding services. Add numbers and click 'Apply'

- ♦ **Immediate** : Calls are forwarded as soon as you receive them.
- ♦ **Busy** : Calls are forwarded whenever your line is busy. If you have multiple (twinning) devices then this service only applies if all of your devices are busy (or reject the call).
- ♦ **No Answer** : Calls are forwarded if you do not answer your phone within a certain time.
- ♦ **Unavailable** : Calls are forwarded if your phone is unavailable (e.g. it is unplugged or loses power).
- ♦ **Selective** : Calls from selected callers are forwarded as soon as you receive them.

The forwarding tab also provides access to your Forwarding Destinations. These are numbers that you regularly forward calls to, and that you preconfigure for ease of use.

The screenshot shows the 'Phone Status' section with the 'Forwarding' tab selected. The interface includes a top navigation bar with 'Home', 'Messages and Calls (2)', and 'Contacts'. Below the navigation bar, there are tabs for 'Summary', 'Forwarding' (which is highlighted in orange), 'Follow Me', and 'Screening'. Under the 'Forwarding' tab, there are sub-tabs: 'Immediately', 'Busy/No Answer' (highlighted in orange), 'Unavailable', 'Selected Callers', and 'Forwarding Destinations'. To the right of these sub-tabs are 'Apply' and 'Cancel' buttons. An orange arrow points to the 'Apply' button. The main content area is divided into two columns. The left column is for 'Forward calls when no answer' and includes a checkbox 'Use same call forwarding configuration for both services.', a checked checkbox 'Forward calls if you do not answer.', a text input field for 'Forward calls to:' containing '234', a hint box stating 'Hint: Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.', and a setting for 'Forward unanswered call after 36 seconds'. The right column is for 'Forward calls when busy' and includes a checked checkbox 'Forward calls if your line is busy.', a text input field for 'Forward calls to:', and a hint box stating 'Hint: Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.'.

## FOLLOW ME

When enabled, this service redirects calls that you receive to one or more alternate destinations. You may configure multiple destinations to ring in turn, simultaneously, or a combination of the two.

To configure this service, you must define a number of rules.



- Each rule defines a destination you want to ring when you receive a call, and how long you wish that destination to ring for.
- Each rule is assigned to a numbered step.
- As soon as you receive a call, all destinations referred to by rules in step 1 begin to ring simultaneously.
- As soon as the last of these destinations has completed ringing, all destinations referred to by rules in step 2 begin to ring simultaneously and so on.
- This continues until the call is answered or all configured destinations have been rung.
- You can have up to a maximum of 6 steps, and multiple rules may be assigned to each step.

To use Follow Me feature tick ☒ the checkbox and click on 'Add Rule'. Add alternate destination numbers and select the order in which they should ring by adding them as different steps as shown below.

Destination to ring: Other
Telephone Number: 234

**Hint:** Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

Ring destination for: 36 seconds during step: 1
Permit forwarding? ☐ Yes ☒ No
Description: CellPhone

OK
Cancel

Add Rule
Clear List

☒ Forward calls you receive to one or more alternate destinations.

	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Office						
CellPhone						
Office 2						

## CALL SCREENING

You can change call screening settings by click on screening on home page. You can select Do Not Disturb, Selective Rejection or Anonymous Rejection

### Phone Status

Summary
Forwarding
Follow Me
Screening

Do Not Disturb
Selective Rejection
Anonymous Rejection

Edit List

Apply
Cancel

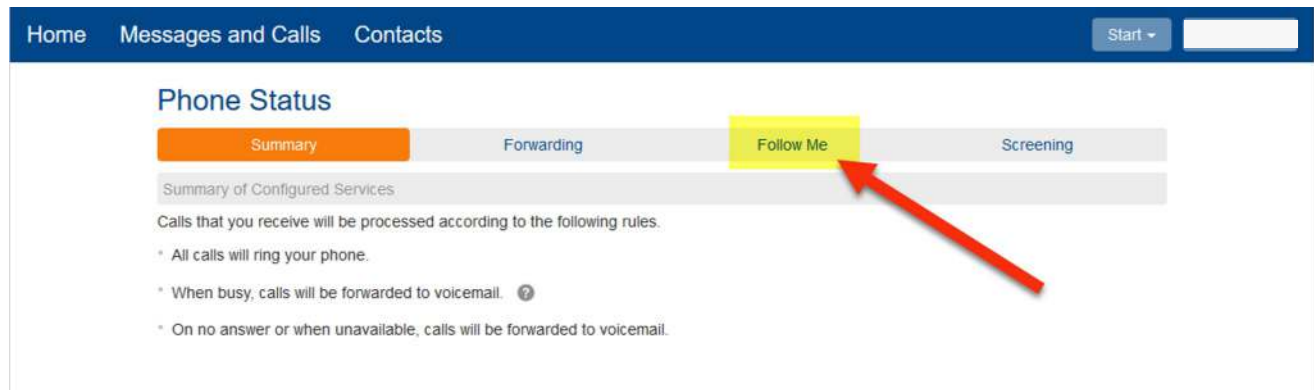
☒ Reject calls if they are from selected callers.

Call To Reject

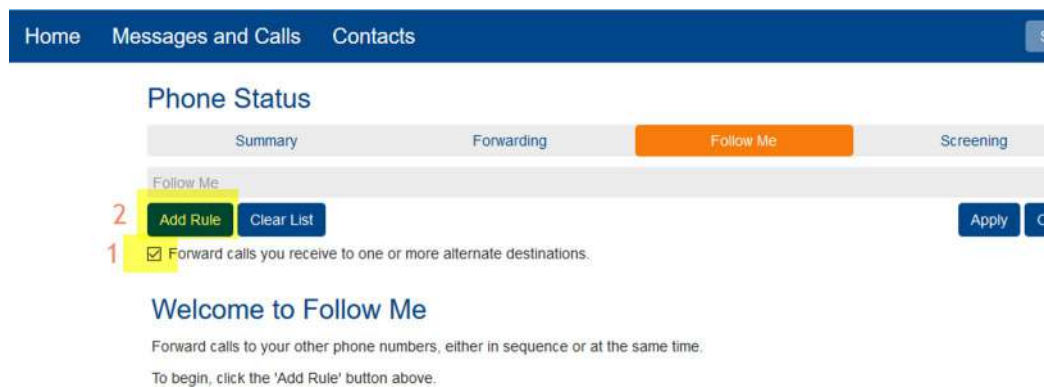
You are not rejecting calls from any numbers.

## SIMULTANEOUS RING

### 1. Launch CommPortal and Hit "Follow Me"



### 2. Place a check in the box that reads "Forward calls you receive to one or more alternate destinations." then, Click "Add Rule"



### 3. In the Pop-Up box, leave "My Phone" as the "Destination to Ring" Set the Ring Duration fill in the description, and Click "OK"

Destination to ring: My Phone

Telephone Number:

**Hint:** Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

Ring destination for 20 seconds during step 1

Permit forwarding? ☐ Yes ☒ No

Description: Desk Phone

OK Cancel

- Click "Add Rule", change "Destination to ring" to "Other", insert the number.  
Set the Ring Duration, fill in the description, and Click "OK"

Destination to ring: Other

Telephone Number: 312-8

**Hint:** Use the Forwarding Destinations tab to add numbers that you frequently forward calls to.

Ring destination for: 20 seconds during step: 1

Permit forwarding? ☐ Yes ☒ No

Description: Jenny's Number

OK Cancel

- Click Apply and you are done.

Home Messages and Calls Contacts Start

### Phone Status

Summary Forwarding Follow Me Screening

Follow Me

Add Rule Clear List

☒ Forward calls you receive to one or more alternate destinations.

	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Desk Phone						
Jenny's Number						

Apply Cancel

Note - If you add additional phones if you would like to have more ring. The call will ring in groups. All phones in the "Step 1" will ring at the same time, then it will move on to another Step if you configured one.

### Phone Status

Summary Forwarding Follow Me

Follow Me

Add Rule Clear List

☒ Forward calls you receive to one or more alternate destinations.

	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6
Desk Phone						
Jenny's Number						
Home Phone						

## DEVICE MANAGER

You can customize your phone's line key settings such as Speed Dials, Enhanced Call Monitoring "BLF", Enhanced Call Park "Orbits" and Intercom/PTT. Features are available based on your phone make and model. To check your phone number and set keys hit the 'Devices' link.

1. Once you hit the 'Devices' link, [Devices](#)  
Click on 'Set Keys' as shown below :

### Devices

Desk Phone (330)  [set keys](#)

Click Here

OK

2. New window pops up as shown below. Click on 'Edit' to edit phone key settings  
(Note - Phone information may differ based on the phone you have).



## Manage your phones



3. You can change settings for all your phone line keys here as shown below (phone settings may appear differently based on the type of phone you have):

🏠 Yealink SIP-T42S - Edit settings for Ford Test / 330



- › Programmable Keys - Soft Key
- › Programmable Keys - Line Key
- › Features
- › Preferences
- › Line 1
- › Line 2
- › Line 3
- › Line 4
- › Line 5
- › Line 6
- › Line 7
- › Line 8
- › Line 9
- › Line 10
- › Line 11

### ▼ Programmable Keys - Line Key



## SPEED DIAL ( CONFIGURE PHONE LINE KEYS )

To setup speed dials on phone line key hit the 'Devices' link.

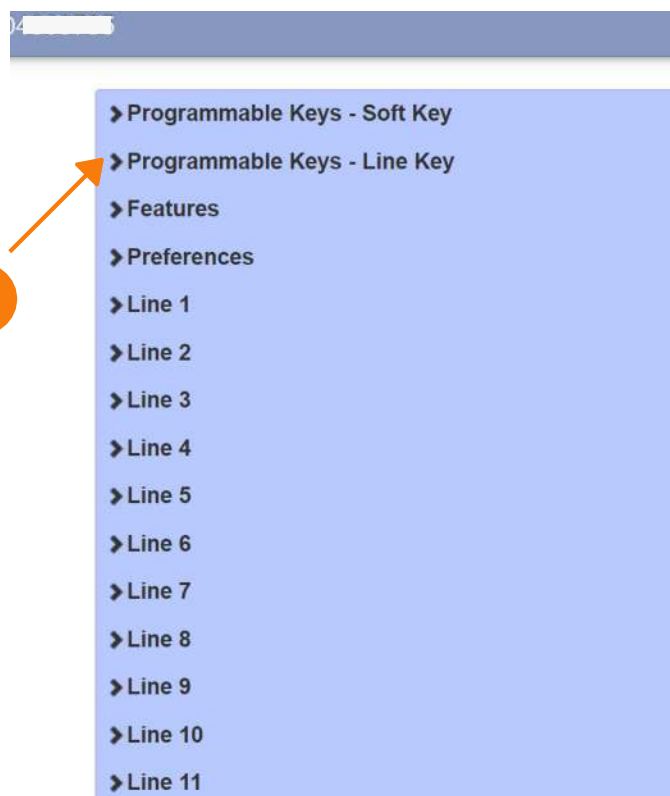
1. Once you hit the 'Devices' link, Click on 'Set Keys' as shown :



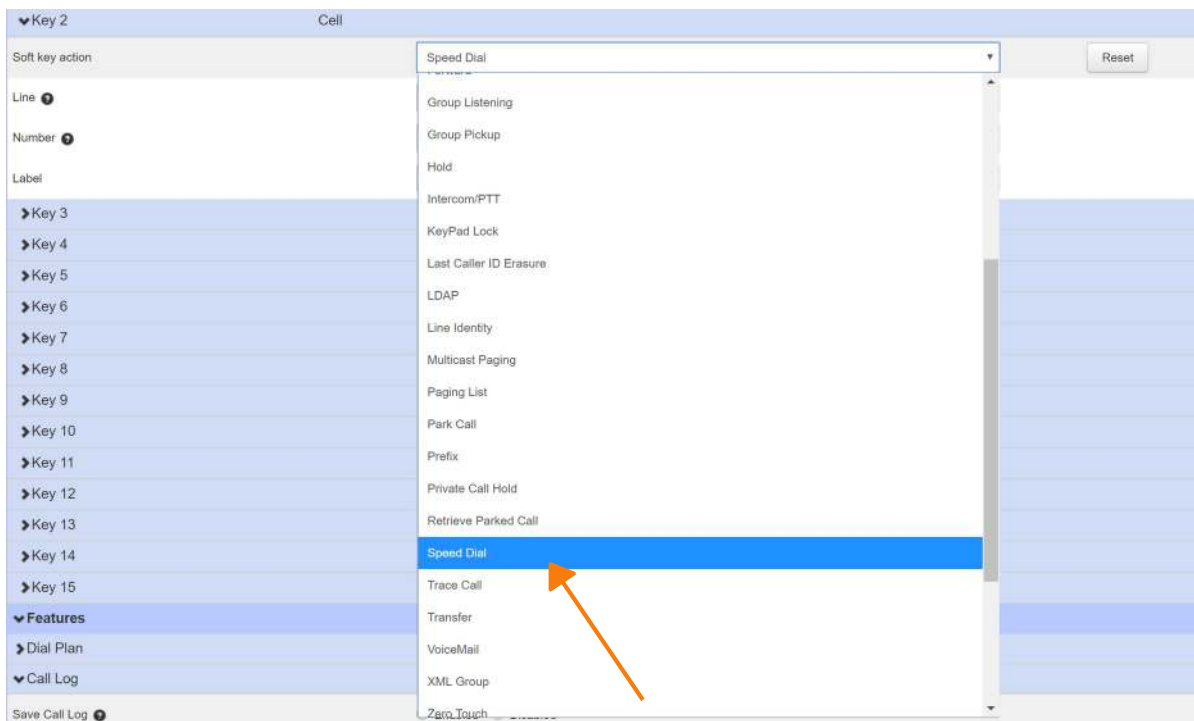
2. New window pops up as shown below. Click on 'Edit' to edit phone key settings and select "Programmable Keys - Line key"  
(Note - Phone information may differ based on the phone you have).



### Manage your phones



3. Choose the key you want to edit, select "Speed Dial" from the list of options as shown below:



4. Add the phone number you want to be set as speed dial, assign a label to be displayed on phone and hit save changes.

5. Configuration settings will be instantly updated on your phone.



## SPEED DIAL ( DIALPAD )

You can assign numbers to dial pad digits. For e.g on pressing digit 2 call (111) 111 - 1111

1. Click on "Contacts" and select "Speed Dials"

The screenshot shows the 'Speed Dials' tab selected in the 'Contacts' section. An orange arrow labeled '1' points to the 'Speed Dials' tab. Another orange arrow labeled '2' points to the 'Speed Dials' section header. The page includes a 'Clear List' button and a message: 'You have no speed dials set up.' Below this is a 'New Speed Dial' form with a 'Speed Dial' dropdown set to '2' and an empty 'Number' field. 'Apply' and 'Cancel' buttons are at the top right.

2. Select Speed Dial number to be assigned to the phone number and add 10 digit phone number, hit "Add"

This is a close-up of the 'New Speed Dial' form. The 'Speed Dial' dropdown is set to '2'. The 'Number' field contains '123456789'. An orange arrow points to the 'Add' button.

3. You can add more speed dials or hit "Apply" to save settings.

The screenshot shows the 'Speed Dials' page with a table of existing speed dials and a 'New Speed Dial' form. An orange arrow points to the 'Apply' button.

Speed Dial	Number
2	123456789

**New Speed Dial**

Speed Dial: 3

Number:

Buttons: Clear List, Add, Apply, Cancel

## ENHANCED MONITORED EXTENSION ( BUSY LAMP FIELD BLF )

To setup monitored extensions on phone keys hit the 'Devices' link.

1. Once you hit the 'Devices' link, Click on 'Set Keys' as shown :

[Devices](#)

### Devices

Desk Phone (330) [set keys](#)

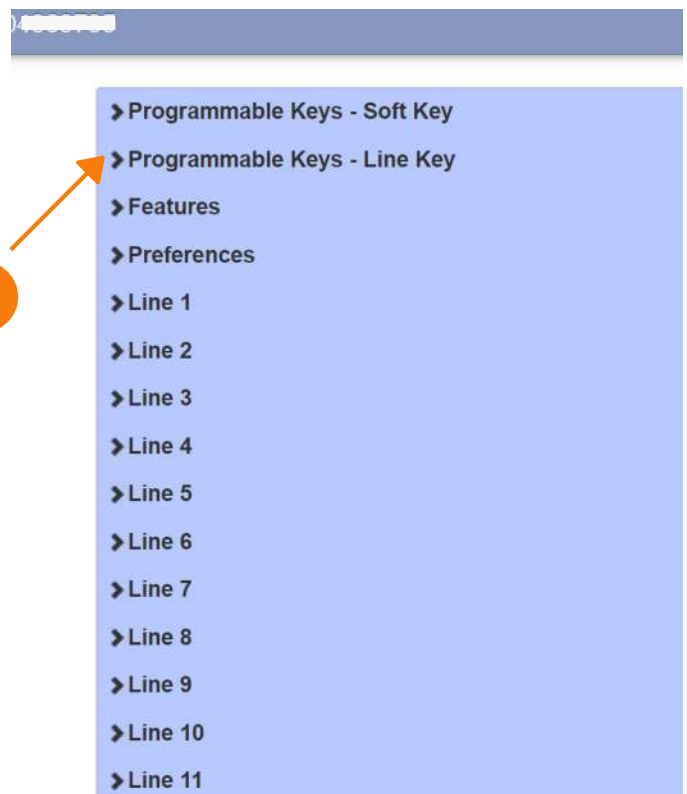
Click Here

OK

2. New window pops up as shown below. Click on 'Edit' to edit phone key settings and select "Programmable Keys - Line Key"  
(Note - Phone information may differ based on the phone you have).



### Manage your phones



3. Select "Enhanced Monitored Extensions" from the list of options as shown below:

▼ Programmable Keys - Line

▶ Key 1

▼ Key 2 Ashley

Soft key action: Enhanced Monitored Extension (dropdown menu open)

Extension: None

Use Subscriber Name as Label ⓘ

Label: Michelle

▶ Key 3

▶ Key 4

▶ Key 5 Preet

▶ Key 6

▶ Programmable Keys - Bottom

▶ User

▶ Network Settings

▶ Paging Groups

▶ Push-To-Talk

▶ Advanced

Reset

Enhanced Monitored Extension (highlighted in dropdown menu)

Monitored Extension

Enhanced Call Park

Group Pickup

Last Caller ID Erasure

Line

Line Identity

Park Call

Retrieve Parked Call (Specified Orbit)

Speed Dial

One Touch Transfer

Trace Call

Voicemail

Macro Soft Key

4. Add phone extension, choose label options and hit "Save changes"

\*Soft key action: Enhanced Monitored Extension (1)

Reset

Extension: 9791 (2)

Use Subscriber Name as Label ⓘ

Yes - Requires the subscriber's full DN as the extension to monitor

No (3)

\*Label: Joe Smith (4)

Update phone(s) immediately when saving (checked) Discard changes Save changes

5

5. Configuration settings will be instantly updated on your phone.

## ENHANCED CALL PARK ( ORBITAL PARKING )

To setup 'call park' feature on phone keys click on 'Devices'.

1. Once you hit the 'Devices' link, [Devices](#)  
Click on 'Set Keys' as shown :

### Devices

Desk Phone (330) [set keys](#)

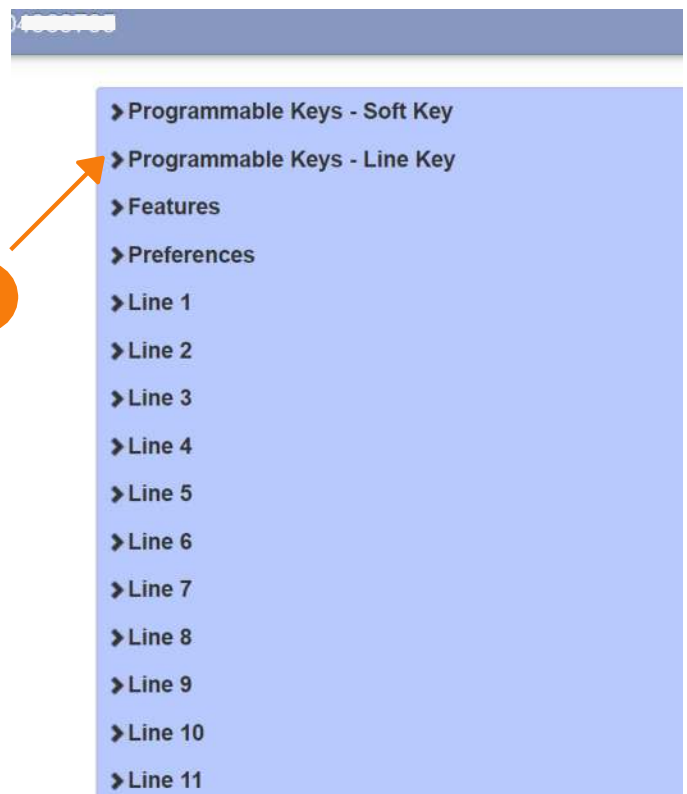
Click Here

OK

2. New window pops up as shown below. Click on 'Edit' to edit phone key settings and select "Programmable Keys - Line Key"  
(Note - Phone information may differ based on the phone you have).



### Manage your phones



3. Select "Enhanced Call Park" from the list of options as shown below:

Programmable Keys - Soft Key

Line Key 1-6 -- Column 1

Key 1

Key 2 Park 1

Soft key action: Enhanced Call Park

Reset

Line: None

Park Orbit: Line

Label: Automatic Call Back

Key 3: Automatic Recall

\*Soft key action: Conference

Key 4: Directed Pickup

Key 5: Directory

Key 6: DND

Line Key 7-11 -- Column 5

Line Key 12-17 -- Column 2

Line Key 18-23 -- Column 3

Line Key 24-29 -- Column 4

Features

Preferences

Line 1

Line 2

Line 3

Line 4

Line 5

Line 6

Line 7

Line 8

Line 9

Enhanced Call Park

Enhanced Monitor Extension

Forward

Group Listening

Group Pickup

Hold

Intercom/PTT

Last Caller ID Erasure

LDAP

Line Identity

Multicast Paging

4. Select parking orbit and add a name to be displayed on your phone. Click "Save Changes"

Key 2 Park 1

\*Soft key action: Enhanced Call Park 1

Reset

Line: Line 1

Park Orbit: 1 2

Label: Park 1 3

☒ Update phone(s) immediately when saving

4

5. Configuration settings will be instantly updated on your phone.

6. To retrieve a parked call dial \*14 followed with the orbit number. For e.g. If you parked the call on park orbit 1 dial \*141 to retrieve the call.

## CHANGE SETTINGS

The panel at the bottom of the CommPortal Home page allows you to make various changes to your settings. For example:



- ♦ To change your password and/or PIN, or your security email address, click on the links under Security at the bottom of the Home page.

[Change Password](#) - To change Commportal password

[Change Voicemail PIN](#) - To change Voicemail PIN

- ♦ The Calls Settings page allows you to control various call settings, for example withholding your caller ID and configuring Call Forwarding settings.

Home Messages and Calls (2) Contacts Start

Call Settings Message Settings Notifications

### Call Settings

Apply Cancel

**General**

Caller transfer is not available as no operator number has been set for your business group.

☐ Withhold caller ID when making calls

If not withheld, signal my name as: AshwinManiyan

☒ Provide caller ID for incoming calls

☒ Provide caller name for incoming calls

**Call Forwarding**

Ask me for a forwarding number each time I turn on forwarding from my phone using an access code:

☒ Immediate Forwarding

☒ Busy Forwarding

☒ No Answer Forwarding

**Call Blocking**

Choose which types of phone numbers should be blocked.

☐ Local

☐ National and Mobile

☐ International

☒ Premium Rate

☐ Operator

☐ Directory

☐ Access Codes

☐ Access codes that change configuration

- ♦ The Messaging Settings page enables you to control how your messages are handled, for example you manage mailbox settings, customize how you are notified of a voicemail, configure greetings, and more. Using Voicemail Greetings you can personalize your voicemail greeting by recording an announcement (a microphone is required).

The screenshot shows the CommPortal interface with the 'Message Settings' page selected. The top navigation bar includes 'Home', 'Messages and Calls (2)', and 'Contacts'. Below the navigation bar are three circular icons: 'Call Settings', 'Message Settings' (which is highlighted with a white triangle), and 'Notifications'. The 'Message Settings' page has an 'Apply' button and a 'Cancel' button in the top right corner. The settings are organized into three sections: 'General', 'Mailbox Access', and 'Voicemail Greeting'. The 'General' section includes options for forwarding calls to voicemail after 30 seconds, transcribing voicemails, enabling live screening, and forwarding messages as emails. The 'Mailbox Access' section includes options for fast login, auto-play voicemail, and voicemail playback settings. The 'Voicemail Greeting' section includes options for using a system greeting or a custom greeting, with links to 'record' a new greeting.

Home Messages and Calls (2) Contacts Start

Call Settings Message Settings Notifications

### Message Settings

Apply Cancel

▼ General

Incoming calls are forwarded to voicemail after 30 seconds

☒ Transcribe voicemails in your inbox

☐ Enable live screening ?

☐ Forward messages as emails

Forward to:

add an email address

☐ Leave original in Inbox

☐ Include action links in emails

▼ Mailbox Access

☒ Fast Login

☐ Auto-play voicemail

Voicemail playback Details and Message ▼

▼ Voicemail Greeting

Use the greeting: System with name \* ▼ edit

▼ more options

☐ Use a different greeting when I'm in a call. record

☐ Use different greeting within my business group. record

## DOWNLOADING APPS

You can use the Downloads link, [Downloads](#), located at the foot of the CommPortal Home page, to access a range of apps that you can download onto your computer or your mobile/tablet so that you can always have access to the key CommPortal features on your desktop or mobile device.



## MORE QUESTIONS?

If you have any additional questions about setting up voicemail call us at **800-881-3066** or email **Support@Call7.com.com**.

You can access all user guides here:

<https://www.call7.com/products/cloud-ip-pbx/user-guides/>