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1 Introduction

This manual describes CommPortal, a web interface that allows you to manage calls and call services using a browser.

1.1 About This Manual

This manual contains the following chapters that describe the different features of the CommPortal UI.

- [CommPortal Overview](#) on [page 5](#) provides an overview of the CommPortal UI and the key concepts associated with it, including a description of how subscribers and service provider administrators log in to the CommPortal Interface.
- [Features for subscribers](#) on [page 9](#) describes the features and services provided to subscribers using the CommPortal UI.
- [Features for BG Administrators](#) on [page 26](#) describes the interface used by Business Group Administrators.

2 CommPortal Overview

CommPortal is an advanced web-based self-care interface which allows you, the subscribers to view and manage the configuration of your account. (CommPortal.AireSpring.com)

CommPortal can also be used by administrators to view and update subscribers' accounts. There are specific CommPortal UIs for different types of subscriber and administrator and these are described in this manual. (CommPortal.AireSpring.com/bg)

- [Features for subscribers](#) on [page 9](#) describes the features of the CommPortal UI seen by individual subscribers.

2.1 Interface overview

CommPortal is the main web-based interface to access your account using a browser. Subscribers can use CommPortal to control Call Manager settings, listen to voicemails, and configure all the features associated with an account.

On accessing CommPortal, subscribers see the following Home page. The CommPortal Home page automatically displays Call Manager service as well as links to all other services. The options displayed are controlled by your subscriber Class of Service and any customization that you may carry out on the default UI.

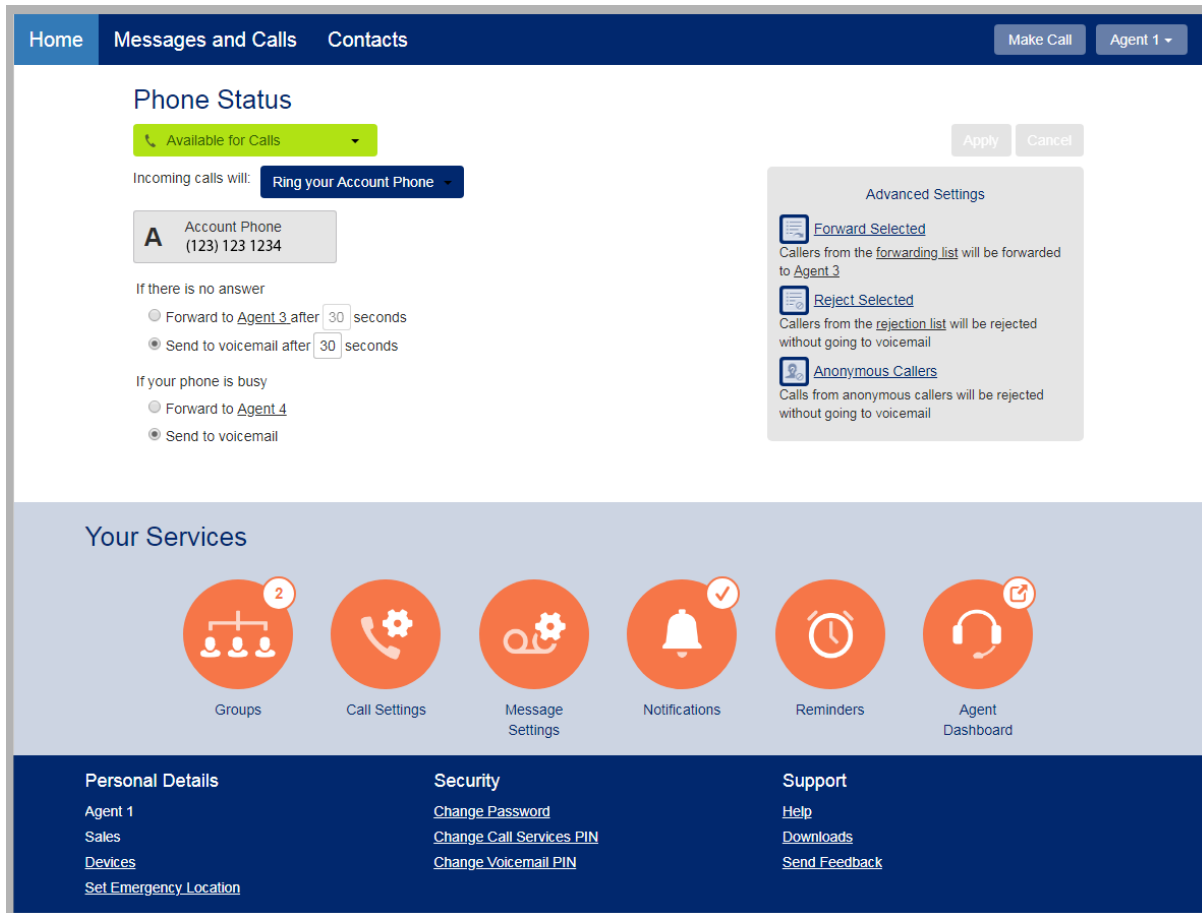


Figure 1: CommPortal UI Home Page

Subscribers can click the text links in the top and bottom ribbons and the orange icons to launch new pages where they can view and manage the other features of the CommPortal account. Some of the orange icons display information about that service at the top right of the icon - for example a check shows that a service has been enabled, a number is a count of the particular item, and indicates that the subscriber will leave the CommPortal UI when clicking this icon. For a detailed description of the options on the Home page, see [CommPortal Subscriber Home page](#) on [page 9](#).

2.2 Browser and Operating System support

CommPortal is supported on the latest versions of all major browsers and operating systems.

Some of the additional features available with CommPortal may be restricted in some browsers or operating systems.

WebRTC and Flash

CommPortal allows subscribers to record new voicemails, greetings and reminders, and to add introductory messages to voicemails they are forwarding.

Where browsers support it, CommPortal uses a WebRTC component to play and record this audio. Some browsers, for example Internet Explorer, do not currently support this WebRTC function and instead use Adobe Flash. If you are using a browser that does not support the CommPortal WebRTC function, you will need to install the Flash plug-in.

Installing the Adobe Flash plug-in

Note:

This procedure is only required if you are using a browser that does not support WebRTC.

You must use Version 10 or later of the Adobe Flash plug-in. CommPortal provides a link to a free download of the Flash plug-in from Adobe's website (which may require administrator privileges to install). If possible, use a computer running a Microsoft Windows OS to make recordings, rather than one running a Mac OS. This is due to the limitations of the Flash plug-in when running on a Mac OS.

The recording function requires access to the user's microphone, and Flash will query the user (using its own UI) to confirm that they allow this. By default, Flash does this every time the user attempts to start a recording, but it provides an option to permanently enable access to the microphone.

2.3 Logging in to CommPortal

2.3.1 Subscriber access

Log in to CommPortal in one of the following ways.

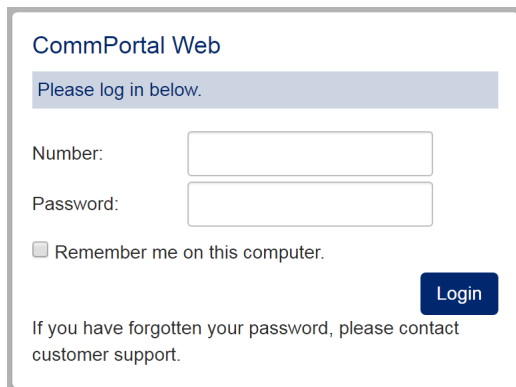
Subscribers can use a CommPortal login URL (CommPortal.AireSpring.com) to navigate to the login page, and enter their telephone number (main or additional number) followed by their CommPortal password or Voicemail PIN.

A subscriber will be locked out of their CommPortal account if they enter an incorrect password or PIN six times in succession. This restriction protects against malicious use. If you have forgotten your password, please contact customer support.

- If you are in a region where telephone numbers are changing as a result of an Area Code Split (ACS), log in using your telephone number with the old area code up to the point at which the ACS change has been made. After the ACS change, always use the new area code.

Remember Me feature

You can opt to check the Remember Me on This Computer check box on the login page. This will save the subscriber's login details so that when you next use CommPortal, you will not have to log in.

A screenshot of the CommPortal Web login page. It has a title "CommPortal Web" and a subtitle "Please log in below." in a light blue box. Below this are two input fields: "Number:" and "Password:". Under the password field is a checkbox labeled "Remember me on this computer." To the right of the checkbox is a dark blue "Login" button. At the bottom, there is a link: "If you have forgotten your password, please contact customer support."/>

CommPortal Web

Please log in below.

Number:

Password:

☐ Remember me on this computer.

Login

If you have forgotten your password, please contact customer support.

Figure 2: CommPortal Login page showing Remember me check box.

Note:

To help ensure that accounts are kept secure, use the feature only on your personal computer and not on public computers (for example, in an internet cafe) and to log out of CommPortal rather than just closing the web browser application, especially if sharing a personal computers with other users.

3 Features for subscribers

The default CommPortal UI, available in US English, enables subscribers to view and manage the different features of their telephone service using their CommPortal account.

The following documents provide an overview of the features available to subscribers on the default CommPortal UI.

- [CommPortal Subscriber Home page](#) on page 9
- [CommPortal Call Manager](#) on page 14
- [CommPortal Message and Calls page](#) on page 16
- [CommPortal Contacts page](#) on page 18
- [CommPortal Groups page](#) on page 20
- [CommPortal Call Settings page](#) on page 20
- [CommPortal Message Settings page](#) on page 22
- [CommPortal Notifications page](#) on page 23
- [CommPortal Reminders page](#) on page 24
- [CommPortal Agent Dashboard](#) on page 25

3.1 CommPortal Subscriber Home page

You will see a screen similar to the following when you first log on to your CommPortal account.

The CommPortal Subscriber Home page displays the most important aspects of a subscriber's CommPortal account, including their phone status, and provides easy navigation to the other CommPortal screens where they can access their messages, view their contacts and configure notifications.

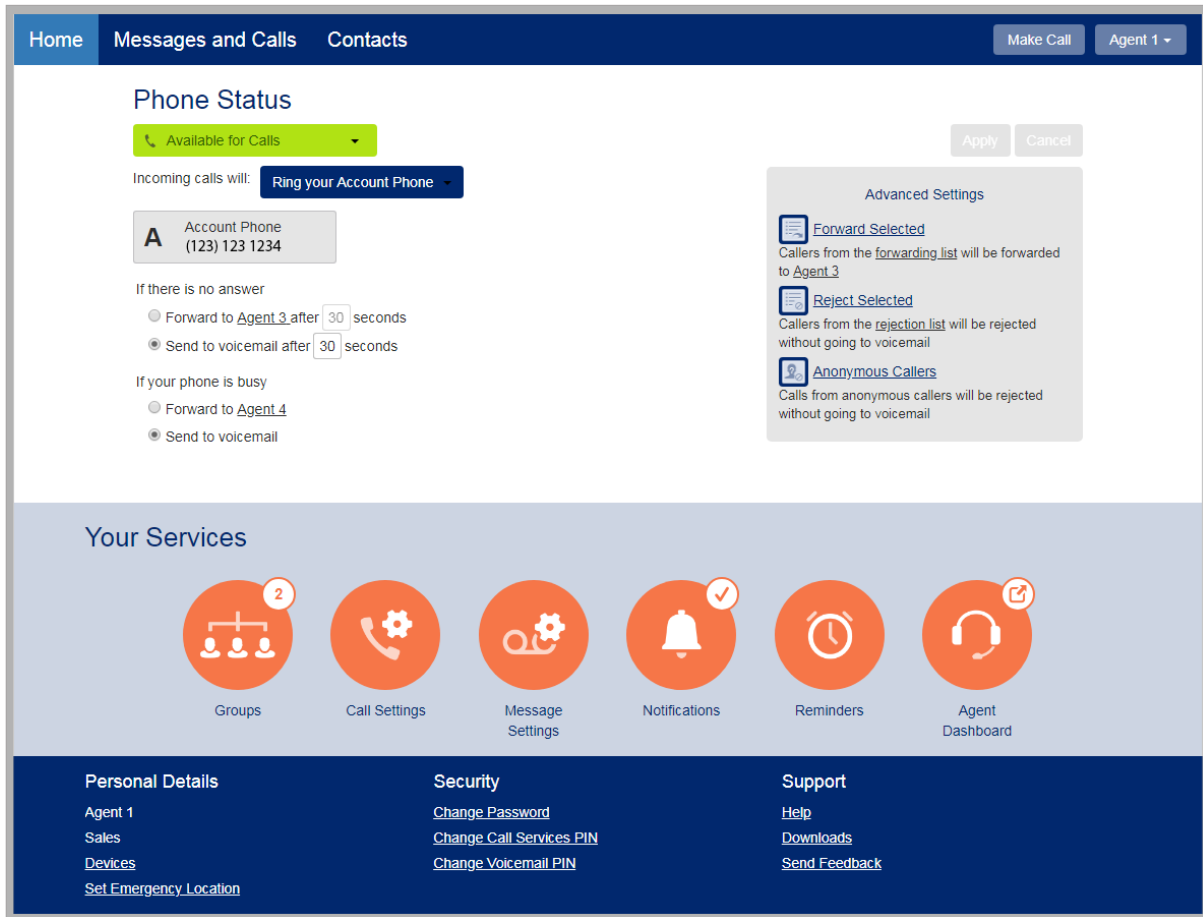



Figure 3: CommPortal UI Home page

The screen is divided into several panels. The top ribbon provides:

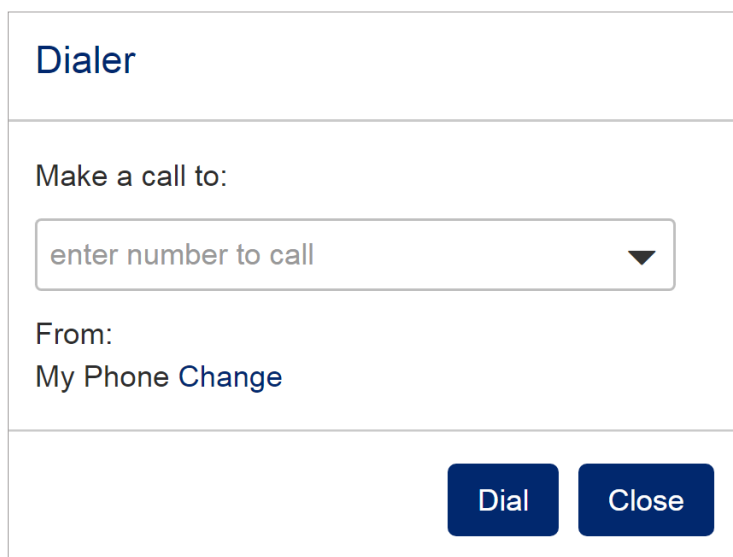
- A count of the unread messages and faxes in the subscriber's mailbox and a link to the Messages and Calls page described in [CommPortal Message and Calls page on page 16](#)
- A link to the subscriber's Contacts page, described in [CommPortal Contacts page on page 18](#)
- A warning icon if the subscriber's mailbox is full or approaching capacity
- A **Make Call** button that launches the Dialer (described in [Click-to-Dial on page 12](#)). If the subscriber has Accession Meeting, the Make Call button is replaced by a Start box with a drop-down menu that includes the Make Call option as well as links to start an Accession Meeting and/or manage an Accession Webinar.
- A drop-down that enables a subscriber with multiple phone numbers associated with their account to select one of these alternative numbers and view their CommPortal account for that number. This drop-down also includes the Logout link that enables a subscriber to log out of CommPortal, for example if they are viewing their account on a public computer.

- The Phone Status panel displays the subscriber's Call Manager service. See [CommPortal Call Manager](#) on [page 14](#) for details.
- The Your Services panel displays icons for the different services available to this subscriber that provide links to new screens where the service can be configured or managed. Some of these icons display information about that service at the top right of the icon.
 - A check indicates if a service has been enabled.
 - A number is a count of the particular item, for example how many Groups a subscriber currently belongs to.
 -  indicates that the subscriber will leave the CommPortal UI when clicking this icon, for example to launch the Agent Dashboard if the subscriber is an AirePBX Call Center.
- These services may include the following, all of which are described in separate sections below:
 - [CommPortal Groups](#) page on [page 20](#)
 - [CommPortal Call Settings](#) page on [page 20](#)
 - [CommPortal Message Settings](#) page on [page 22](#)
 - [CommPortal Notifications](#) page on [page 23](#)
 - [CommPortal Reminders](#) page on [page 24](#)
 - [CommPortal Agent Dashboard](#) on [page 25](#)
- **The Personal Details, Security and Support** panel allows the subscriber to:
 - configure any additional devices, for example their desk phone.
 - Clicking on this link launches a pop-up where the subscriber can see details of their current devices and, if they have a desk phone, use a set keys link to launch a further pop-up where they can configure the keys on the selected device.
 - Set their emergency location so that if they need to make a 911 call it can be routed to an emergency operator near the subscriber. Change their password, Call Services PIN, or the Security Email address. The security email address is used to let subscribers know of any PIN or password changes and send password reset links.
 - Access CommPortal's Help pages.
 - Launch the Downloads pop-up described in [Downloads](#) on [page 12](#).

Click-to-Dial

Subscribers can make a Click-to-Dial call directly from CommPortal by clicking the **Make Call** button on the Home page. Subscribers with Accession Meeting access this option by clicking the down arrow next to the **Start** button on the top ribbon and selecting **Make Call**.

Clicking the **Make Call** link launches the following pop-up.

The Dialer pop-up is a white rectangular box with a thin grey border. At the top, the word "Dialer" is written in a blue sans-serif font. Below this, the text "Make a call to:" is followed by a text input field containing the placeholder "enter number to call" and a small downward-pointing triangle icon. Underneath the input field, the text "From:" is followed by "My Phone" and a blue "Change" link. At the bottom right of the pop-up, there are two dark blue buttons with white text: "Dial" and "Close".

Dialer	
Make a call to:	
<input type="text" value="enter number to call"/>	
From:	
My Phone Change	
Dial	Close

Figure 4: Dialer pop-up

- Select a contact or type a name or number in the input box - CommPortal will show any matches with the subscriber's contacts as they type.
- Make the call using the phone number that is displayed, or click Change to select one of their other configured numbers or type in a new number. When the subscriber clicks Dial, the phone they have chosen for making the call will ring. The subscriber answers that phone and the call is then made.

Downloads

The **Downloads** link on the bottom panel of the CommPortal Home page launches a pop-up where subscribers can download apps including the Accession Desktop and Accession Mobile clients onto their desktop or mobile devices.

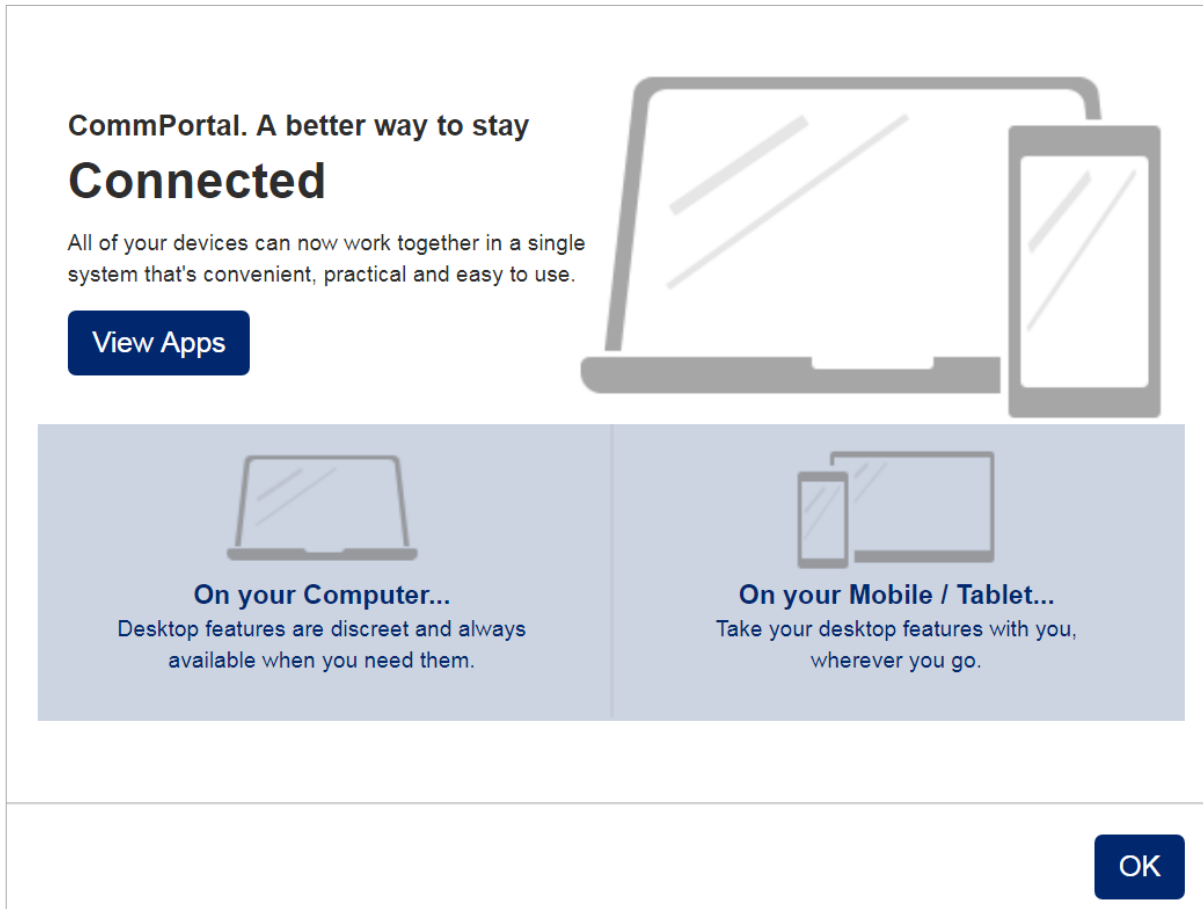


Figure 5: CommPortal Downloads pop-up

3.2 CommPortal Call Manager

A Call Manager service allows subscribers to manage how incoming calls are handled. CommPortal provides a single management interface for all the services affecting incoming calls, so that subscribers can see which services are active and how they interact.

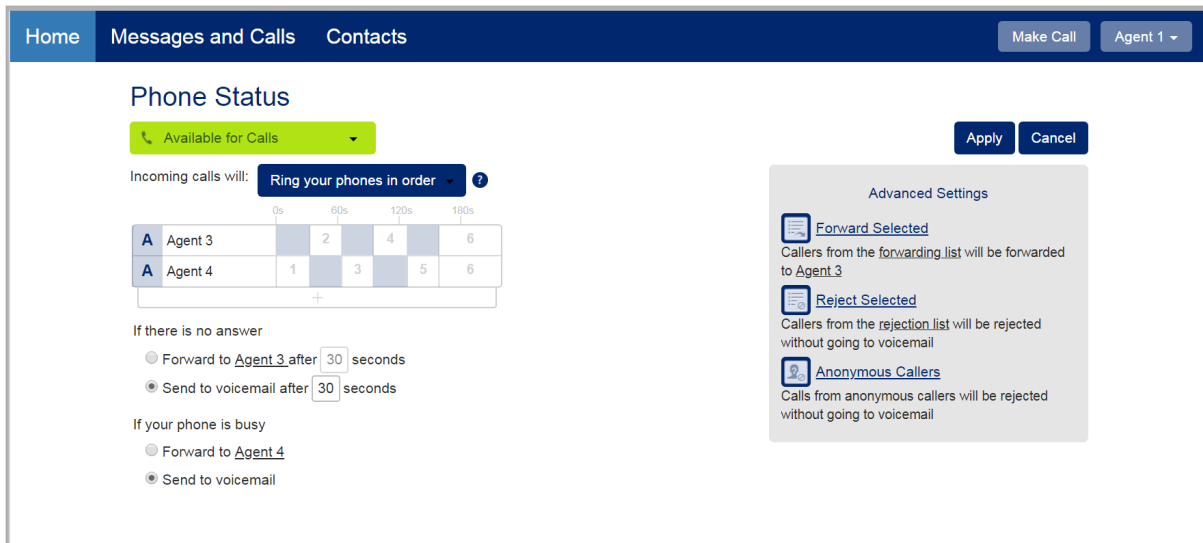


Figure 6. Call Manager

On this screen, subscribers can:

- set their phone status, as described in [Phone Status](#) on [page 14](#).
- configure how incoming calls are handled, as described in [Incoming Call Settings](#) on [page 15](#).
- configure more advanced call services, as described in [Advanced Settings](#) on [page 16](#).

Phone Status

Subscribers use a simple drop-down to set their phone status to Available for Calls or to Do Not Disturb.

- When the drop-down is set to Do Not Disturb, calls will be forwarded to voicemail, although the subscriber can use the link to configure a list of priority callers who can still ring their phone.

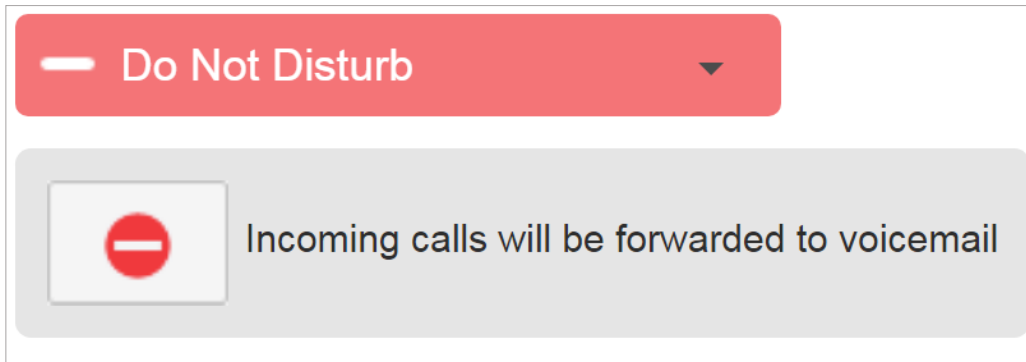


Figure 7: Do Not Disturb

Incoming Call Settings

Subscribers can use drop-down and input fields to configure how their incoming calls are handled.

This includes:

- configuring which phone(s) will ring, setting the order in which these phones will be tried and how long each phone will be allowed to ring.
- forwarding calls to another number.
- setting the behavior if the subscriber either does not answer the call within a specified time period, or all their configured phones are busy.

Incoming calls will: **Ring your phones in order** ?

	0s	60s	120s	180s
A Agent 3		2	4	6
A Agent 4	1	3	5	6

+

If there is no answer

☐ Forward to Agent 3 after seconds

☒ Send to voicemail after seconds

If your phone is busy

☐ Forward to Agent 4

☒ Send to voicemail

Figure 8: Incoming Call settings

Advanced Settings

The Advanced Settings panel allows subscribers to configure and activate the following range of advanced call services.

- **Forward Selected** - calls from numbers on a forwarding list created by the subscriber will be forwarded to another telephone number configured by the subscriber.
- **Reject Selected** - calls from numbers on a rejection list created by the subscriber will be rejected.
- **Anonymous Callers** - calls from anonymous callers will be rejected without going to voicemail.

Subscribers can click on the name of each call service to enable or disable it. When a service is disabled, the icon on the left has a strike through symbol superimposed. The Advanced Settings panel also shows a warning icon if a call service has been made inactive by another setting. For example, on the following screen shot the **Forward Selected** is not active because **Do Not Disturb** is enabled.

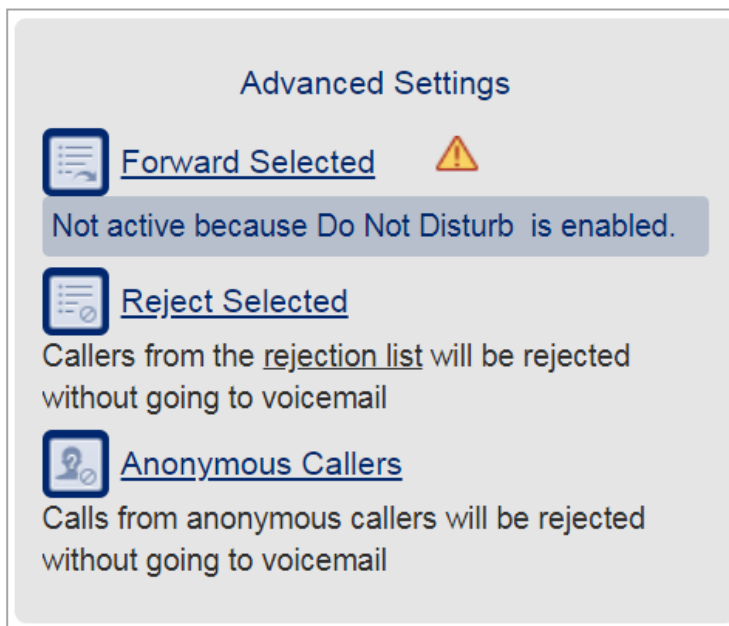


Figure 9: Advanced Settings

3.3 CommPortal Message and Calls page

Subscribers can follow the Messages and Calls link to launch a new screen where they can view lists of calls made, received or missed and manage their messages. If configured for fax service, subscribers will also see details of any faxes sent or received.

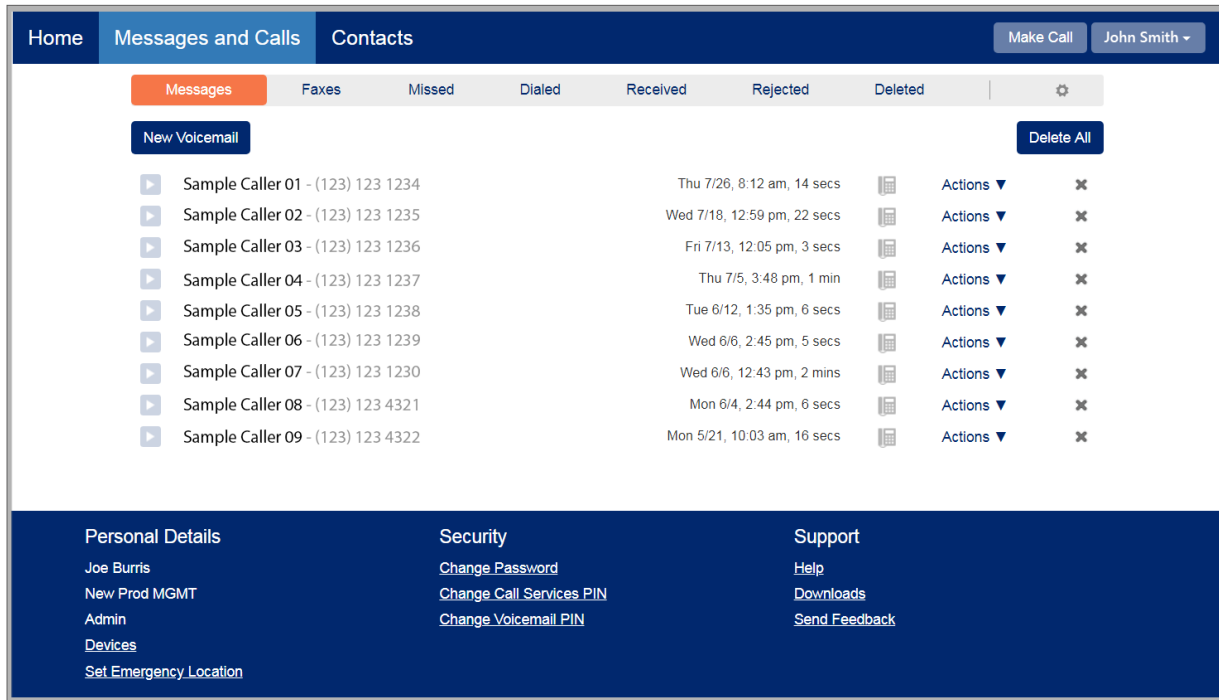


Figure 10: Messages & Calls

The **Messages** screen displays a subscriber's most recent messages, including the time at which the message was received. Messages in bold have yet to be heard.

Using this screen, the subscriber can:

- press the play icon to listen to a message.
- click on the caller's name or number to launch a pop-up where they can call back, add the caller to their Contacts or edit existing contact details for this caller.
- see whether a message was marked as urgent **!** or private **🔒**.
- see icons indicating the type of device the message was received on, for example **📠** indicates a desk phone. Mouse over the icon to see the phone number of the device that was called.
- use the **Action** drop-down to reply to the message, mark it as heard, or forward the message either as an email or a voicemail.
- click the trash icon to delete an individual message or click **Delete All** at the top of the screen to delete all their messages.
- click the **New Voicemail** button at the top of the screen to launch a pop-up where they can record a new message, select the phone number and, if necessary, mark the message as urgent and/or private.

The following screens are accessed by clicking on the option on the gray ribbon at the top of the page:

- The **Faxes** screen is very similar to the Messages screen and displays details of any faxes received by the subscriber.
- The **Missed, Dialed, Received, and Rejected** screens each show lists of calls in that category.
 - As on the **Messages** screen, icons indicate the type of device used for the call and mousing over the icon reveals the phone number of the device.
 - Each screen has an **Export** button that launches a pop-up where subscribers can choose to export call lists of their received, missed, and/or dialed calls in .csv format.
- The **Deleted** screen displays a list of deleted messages. The subscriber can use options on this screen to listen to a deleted message, restore or permanently delete individual messages, and permanently delete all messages.
- The icon provides a handy link to the **Message Settings** page described in [CommPortal Message Settings page](#) on page 22.

3.4 CommPortal Contacts page

Subscribers can click on the Contacts link on the top ribbon of the CommPortal Home page to view and manage their contacts and, if they have configured them, any contact groups.

The Contacts page displays lists of all the subscriber's contact groups (identified by a group icon) followed by their contacts, in alphabetical order. The interface includes a powerful search facility, allowing the subscriber to look up a contact by name, organization name, telephone number or address, rather than having to scroll through a long list.

A subscriber can have up to 1,000 contacts.

When the check box alongside a contact is checked, the existing details for this contact are displayed.

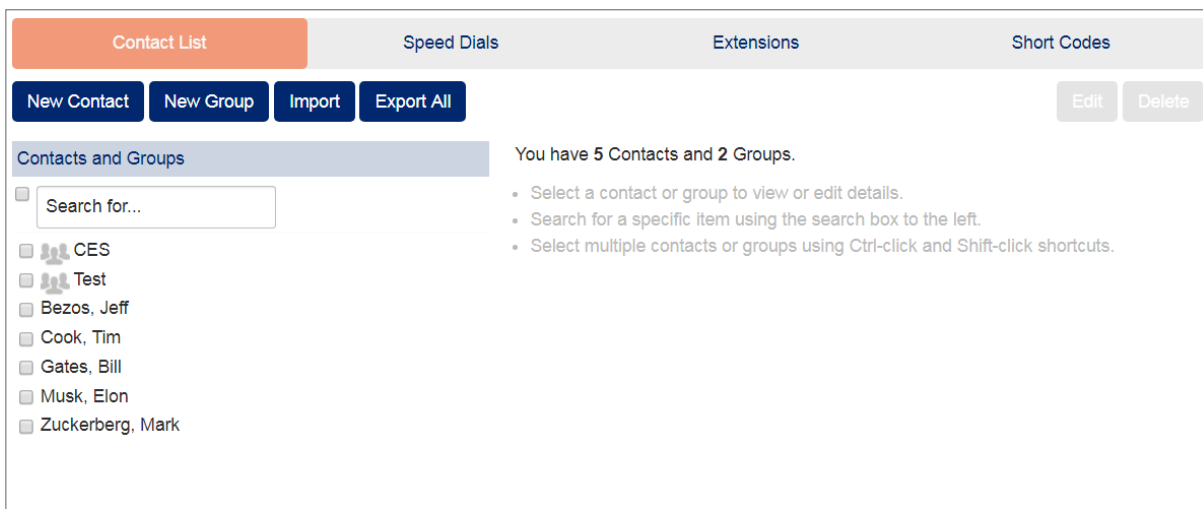


Figure 11: CommPortal Contacts page

The subscriber can use the Edit button to make changes to a contact's details, or press Delete to remove the contact.

As well as being a useful way of storing and retrieving contact details, this Contact List is used in other ways.

- The **Messages and Calls** page displays the names of any callers who appear in a subscriber's contact list.
- Call Manager and other services allow subscribers to specify callers by selecting them from the contact list, without having to type in their numbers.
- Contact lists can be integrated with a subscriber's Outlook contacts.
- Subscribers can use the **Export All** button to download their contacts in .csv format for use outside of CommPortal.
- Subscribers can use the **Import** button to upload a .csv file containing contact details for use in CommPortal. This launches a pop-up where the subscriber can:
 - select the .csv file to import.
 - choose what happens if a contact in the file already exists in CommPortal, for example to overwrite the contact or ignore the imported entry.
 - view the progress of the import. CommPortal will display error messages, for example if the import file is not in the correct format, or contains badly formatted entries.

Speed dials

Speed dials are one or two-digit codes that can be mapped to particular telephone numbers for faster dialing. These codes are then used instead of the telephone number.

If you offer this call service, the subscriber will see a **Speed Dials** link at the top of the Contacts page. This launches a screen where the subscriber can configure and manage their speed dials.

Extensions

If your subscribers are members of a Business Group, they can use extensions to dial other numbers in the Business Group.

The **Extensions** screen displays the extensions that are currently in operation for lines in the Business Group.



Short codes

Business Group subscribers can also use short codes to dial common numbers.



The **Short Codes** screen shows the short codes that are currently in operation.

3.5 CommPortal Groups page

Groups

Multi Line Hunt Groups and Call Pickup Groups you are a member of. For Multi Line Hunt Groups,  indicates logged-in, and  logged-out.

Group Membership

-  Hunt Group: Test Group 01 - Test Department
-  Hunt Group: Test Group 02 - Test Department

Hunt Group: MLHG 1 - Sales

Department: None

Number of Lines: 2 (Logged in: 2)

Status: You are currently logged in to this Hunt Group

[Logout](#)



Position	Number	Ext.	Name
1	(123) 123 1234	02	 Agent 1
2	(123) 123 1235	03	 Agent 2

Figure 12: CommPortal Groups page

The **Groups** button on the CommPortal Home page displays the number of groups that the subscriber belongs to. Clicking on this button launches the **Groups** page.

On the left of this page, the subscriber can see a list of any Multiple Access Directory Numbers (MADNs), Multi Line Hunt Groups (MLHGs) and Call Pickup Groups that they belong to. If the subscriber is a member of an MLHG, they will see an icon alongside each MLHG to indicate whether they are currently logged in or out of that group.

Selecting a group displays full details of the group on the right of the screen. If a subscriber selects an MLHG, they can see which members are currently logged in or out and, if they are able to, can use a link on this screen to log themselves out of the MLHG.

3.6 CommPortal Call Settings page

Subscribers can use the CommPortal Call Settings page to configure call settings including caller ID, call forwarding, call blocking and call jump.

Clicking on the **Call Settings** button launches the **Call Settings** page where a subscriber can configure their call service options.

Call Settings

Apply

Cancel

General

☐ Auto-answer my phone for click-to-dial calls
The call transfer number is set to (818) 922 0464
☐ Withhold caller ID when making calls
If not withheld, signal my name as: ACD Demo
☐ 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

Call Me Buttons

☒ Enable Call Me Buttons

Cancel Existing Buttons

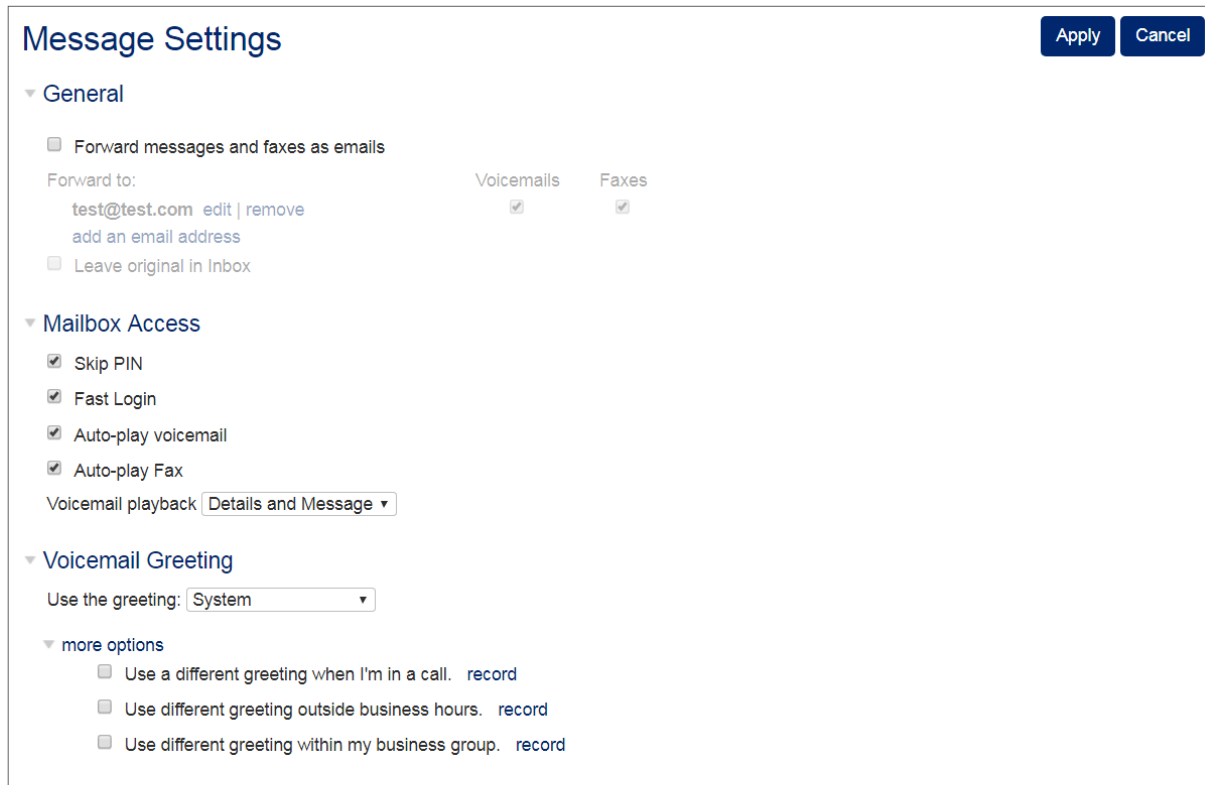
Figure 13: CommPortal Call Settings page

The subscriber uses the check boxes and input fields to specify how their calls should be handled. Subscribers will only see the features they are able to use.

- The **General** panel allows the subscriber to enter a call transfer number and set various caller ID options.
- The **Call Forwarding** panel allows the subscriber to configure whether they need to enter a phone number each time they turn on the Immediate Forwarding, Busy Forwarding or No Answer Forwarding options.
- The **Call Blocking** panel allows a subscriber to bar calls of a particular type, for example they wish to prevent Premium Rate calls being made from their telephone line.
- The **Call Me Buttons** panel allow subscribers to enable or disable their Call Me service and to cancel their existing buttons.

3.7 CommPortal Message Settings page

Clicking on the **Message Settings** button launches the **Message Settings** page where a subscriber can configure how their messages are handled, how they access their mailbox and what greeting will be played to callers reaching their mailbox.



Message Settings Apply Cancel

▼ **General**

☐ Forward messages and faxes as emails

Forward to: test@test.com [edit](#) | [remove](#) Voicemails Faxes
[add an email address](#) ☒ ☒

☐ Leave original in Inbox

▼ **Mailbox Access**

☒ Skip PIN

☒ Fast Login

☒ Auto-play voicemail

☒ Auto-play Fax

Voicemail playback Details and Message ▼

▼ **Voicemail Greeting**

Use the greeting: System ▼

▼ **more options**

☐ Use a different greeting when I'm in a call. [record](#)

☐ Use different greeting outside business hours. [record](#)

☐ Use different greeting within my business group. [record](#)

Figure 14: CommPortal Message Settings page

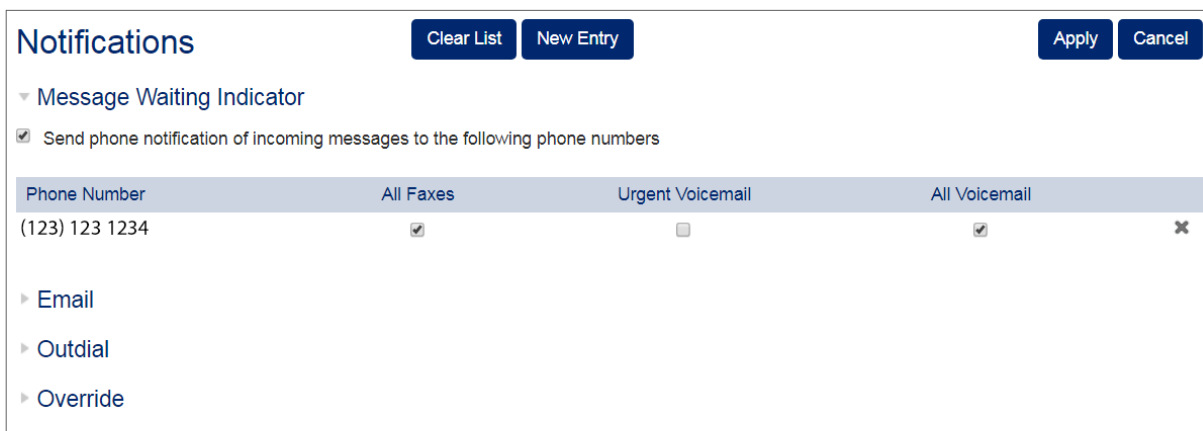
The subscriber uses the check boxes and input fields to specify how their messages should be handled. Subscribers will only see the features they are able to use.

- The **General** panel allows the subscriber to:
 - enable or disable live message screening, and video messaging.
 - configure and manage auto-forwarding of voicemails and faxes.
 - choosing whether to include action links in the outgoing message that allow the subscriber to log in to their account, mark messages as read, or even delete them without needing to access CommPortal. The **Mailbox Access** panel allows the subscriber to configure their mailbox settings by enabling or disabling fast login and skip PIN options and setting message playback options.

- The **Voicemail Greeting** panel enables the subscriber to:
- select their default greeting.
- override their default greeting with a temporary greeting for a defined period of time.
- use the edit button to launch the greetings recorder where they can record or upload a new greeting, or download an existing greeting.

3.8 CommPortal Notifications page

Clicking on the **Notifications** button launches the **Notifications** page where the subscriber can expand the panels to enable and configure Message Waiting Indicators (MWI), email, pager, and outdial notifications and set up an override schedule for their outdial and pager notifications.



Phone Number	All Faxes	Urgent Voicemail	All Voicemail
(123) 123 1234	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 15: CommPortal Notifications page

The subscriber can configure the following types of notification by expanding the relevant panel. However, the subscriber must first enable the notification type using the check box before they can make any changes to configuration.

- On the Message Waiting Indicator panel the subscriber can configure which of their phone numbers will be used to alert them to different types of new messages. This screen automatically includes their primary phone number but they can use the New Entry button to add any of their additional numbers.
- On the Email panel the subscriber can set up one or more email addresses where they will receive emails alerting them to new messages.
- On the Outdial panel the subscriber can enter a phone number that will be called to alert them to new messages and set up a schedule for when these outdials are made. They can also configure a time delay between receipt of a new message and the outdial, and set a retry limit and the delay between retry attempts until the message is marked as read.

- On the Override panel the subscriber can set a new schedule that overrides the schedules they have set for pager and outdial notifications for a defined period. This enables a subscriber to set up a different schedule, for example to cover their annual leave, without having to change their regular schedules for outdial and pager notifications. Once activated, only the override schedule applies and notifications are only delivered to the specified phone or pager until a configured expiry date or until it is manually disabled. Subscribers can only activate the override schedule if they have enabled the outdial or pager notifications service.

Changes in notification behavior

There are a number of circumstances where the behavior of the notifications options will differ depending on the configuration of your deployment or the subscriber's account. The **Short Codes** screen shows the short codes that are currently in operation.

Subscribers who have set up CommPortal to auto-forward their voicemails and faxes to an external email account and to delete these messages from their inbox will not receive any notifications when new messages arrive in their CommPortal account.

- If any of the telephone numbers used for email, outdial and pager notifications are affected by an area code split, the subscriber will have to change these manually once the area code split procedure has been completed, otherwise notifications will no longer be delivered. The MWI notification configuration is changed automatically during the area code split procedure.

3.9 CommPortal Reminders page

Clicking on the **Reminders** button launches the **Reminders** page where a subscriber can configure and manage one-off or recurring reminder calls.

On this page, the subscriber can:

- enable reminder calls for the line they are logged in on.
- view existing reminders, and click on a reminder to edit it or use the trash icon to delete it
- click the **New Reminder** button to launch a pop-up where they can set up a new reminder, including recording the message that will be played during the reminder call
- click **Clear List** to delete all their currently configured reminders.

Reminders

Clear List

Apply Cancel

Occurs	Time	
Every Monday	9:30 am	✕
Every Thursday	9:30 am	✕

New Reminder

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

Occurs: Every Monday

Time: 9 : 30 am

Add

Figure 16: CommPortal Reminders page

3.10 CommPortal Agent Dashboard

If you have AirePBX Call Center, a BG Line User who is a member of an MLHG will see an **Agent Dashboard** button. Clicking on this button launches the **Agent Status** page in a new browser window.

On this screen, the subscriber can:

- see detailed information on the Queues (MLHGs) of which they are a member and log in or out of a Queue using a toggle button (where the Queue supports explicit login/logout).
- view statistics that show real-time information for each Queue, including the number of logged-in members, the number of calls waiting in a queue to be hunted to an agent and the average call waiting time before a call is answered.
- access a Current State drop down menu which will allow them to indicate their current availability for calls.
- see if there are currently any incoming calls for any of the Queues (only available if the MLHG member has Incoming Call Pop-up enabled in their Class of Service.)

4 Features for BG Administrators

The following sections provide an overview of the features available to Business Group Administrators on the default CommPortal BG Admin UI. Your Business Group Administrators may not have access to all these features.

[CommPortal BG Admin Home Page](#) on [page 27](#)

Working with Groups

- [Hunt Groups \(MLHGs\)](#) on [page 28](#)
- [Call Pickup Groups](#) on [page 30](#)
- [Supervisor Dashboard](#) on [page 31](#)

Working with lines and phones

- [Business Group and Department Lines](#) on [page 31](#)
- [Business Group Phones](#) on [page 34](#)

Working with Business Services

- [Business Group Departments](#) on [page 35](#)
- [Business Group Short Codes](#) on [page 36](#)
- [Business Group Account Codes](#) on [page 37](#)
- [Business Group Extensions](#) on [page 38](#)
- [N-Series Music on Hold and Auto Attendant](#) on [page 40](#)
- [Business Group Miscellaneous Settings](#) on [page 40](#)

BG Administrators in Business Groups with 10,000+ lines

If a Business Group is designated as having more than 10,000 lines, it must be divided into Departments and each Business Group line must be in a department. In these Business Groups, you cannot create lines at the top level of the Business Group that are not in any department.

Each administrator will either be an administrator for the entire Business Group or just for particular Department(s) or sub-Department(s).

CommPortal BG Admin users whose admin department is the root department must select a department to view a list of lines in it, or to download call logs for the department. (Alternatively, they can search for lines by subscriber name or DN instead of selecting from a list.) Non-root BG Admin users will see only lines in their own department.

4.1 CommPortal BG Admin Home Page (Commportal.AireSpring.com/bg)

The CommPortal BG Admin UI Home page displays icons of all the services available to the BG administrator as well as listing them on a scrollable left-hand sidebar, both of which provide links to screens where the BG Administrator can view and configure each service.

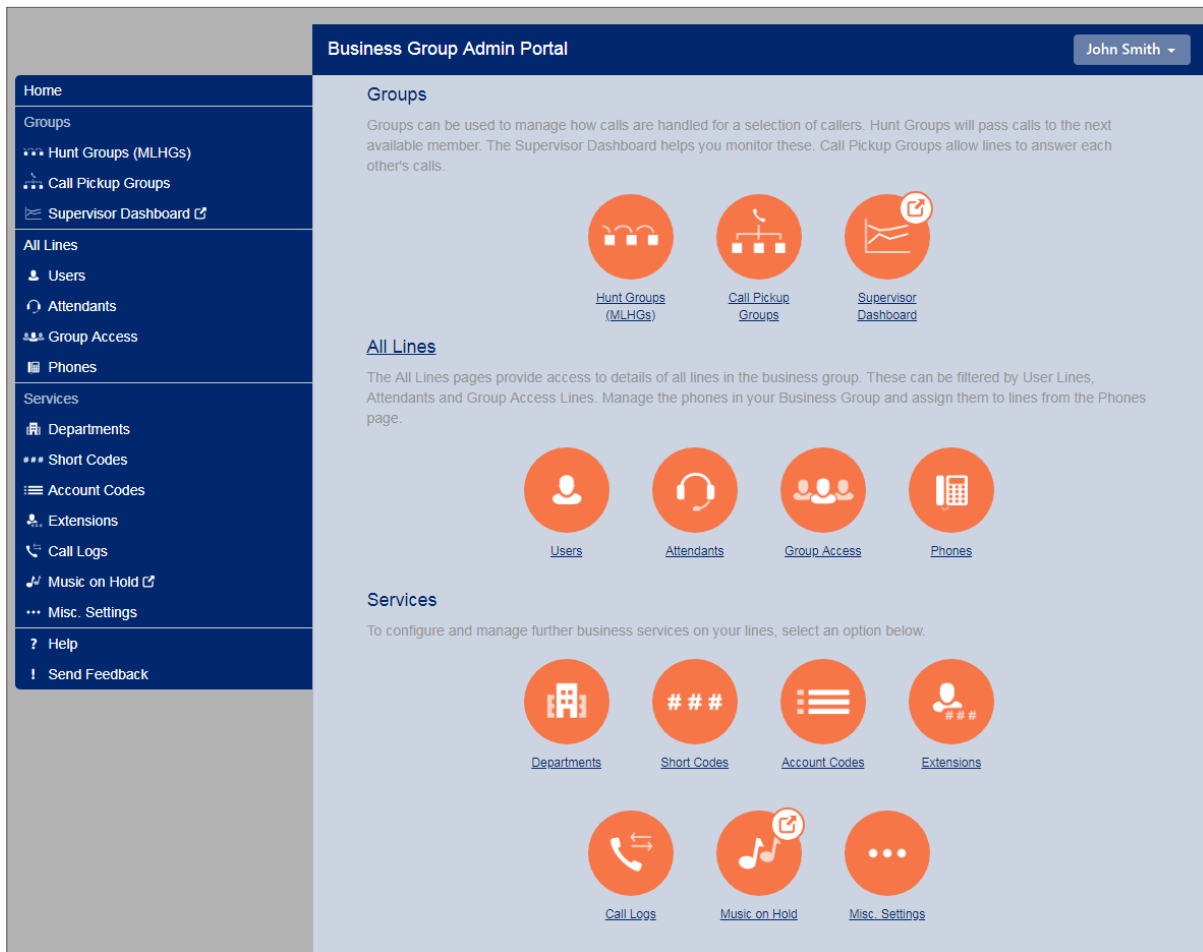



Figure 18: CommPortal BG Admin Home Page

Icons and links that include a  symbol indicate that clicking this will take you out of the CommPortal BG Admin interface. For example, clicking that symbol on the **Supervisor Dashboard** link opens the Integrated ACD Dashboard UI.

The left-hand sidebar also includes the following links:

- **Help**
 - The BG Admin can click on this link to see information about the options on the particular page they are currently viewing.
- **Send Feedback**
 - The BG Admin can use this link to send feedback if they encounter problems using the CommPortal BG Admin UI.

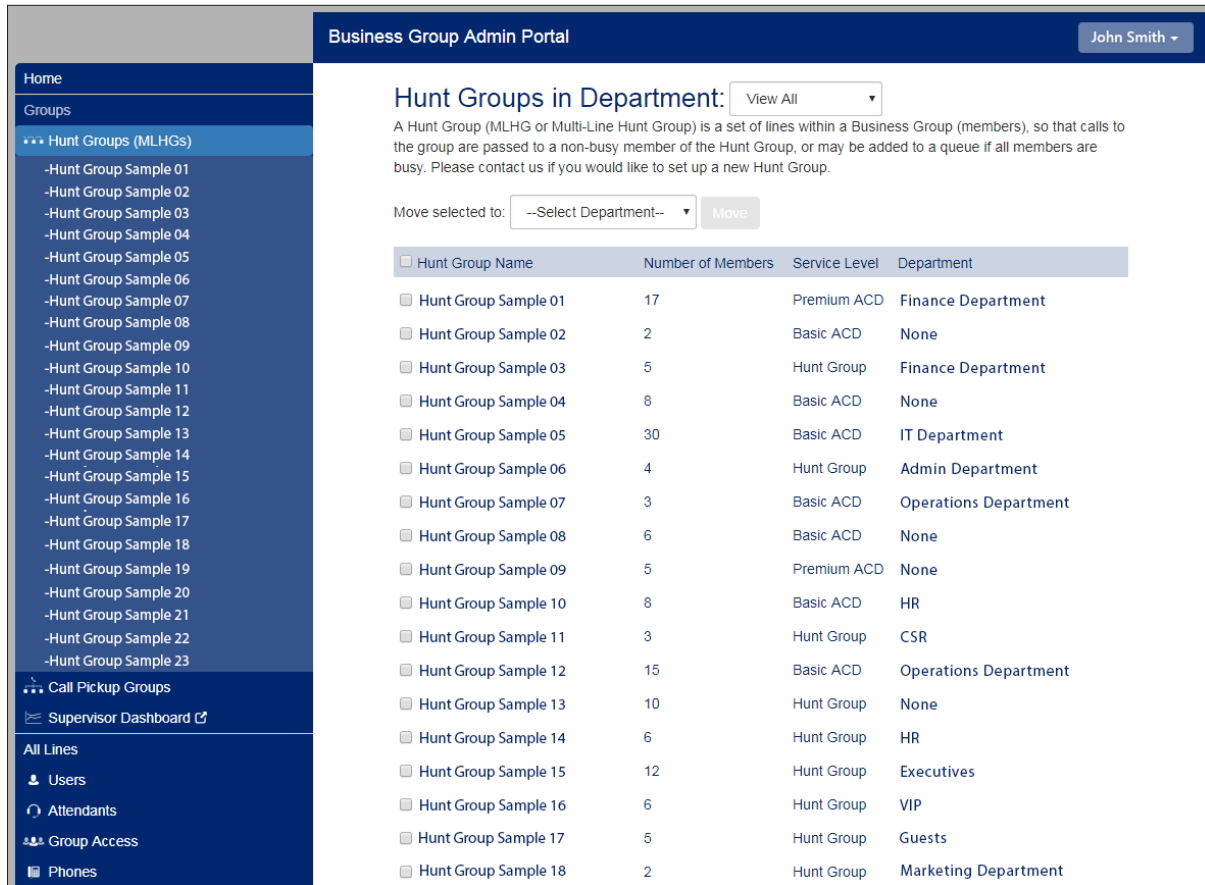
4.2 Working with groups

4.2.1 Hunt Groups (MLHGs)

A **Hunt Group** (also referred to as a **Multi Line Hunt Group** or **MLHG**) is a collection of Business Group lines. Calls to a Hunt Group are passed to the first non-busy line in the group, or to all non-busy lines simultaneously. If all lines are busy, then the caller is added to a queue. A Hunt Group may be used to create a small Call Center.

A single Business Group can have a maximum of 1,000 Hunt Groups.

The Hunt Groups page lists all of the Hunt Groups in the Business Group or selected department (not including those in sub-departments).



Business Group Admin Portal John Smith

Hunt Groups in Department: View All

A Hunt Group (MLHG or Multi-Line Hunt Group) is a set of lines within a Business Group (members), so that calls to the group are passed to a non-busy member of the Hunt Group, or may be added to a queue if all members are busy. Please contact us if you would like to set up a new Hunt Group.

Move selected to: --Select Department-- Move

<input type="checkbox"/> Hunt Group Name	Number of Members	Service Level	Department
<input type="checkbox"/> Hunt Group Sample 01	17	Premium ACD	Finance Department
<input type="checkbox"/> Hunt Group Sample 02	2	Basic ACD	None
<input type="checkbox"/> Hunt Group Sample 03	5	Hunt Group	Finance Department
<input type="checkbox"/> Hunt Group Sample 04	8	Basic ACD	None
<input type="checkbox"/> Hunt Group Sample 05	30	Basic ACD	IT Department
<input type="checkbox"/> Hunt Group Sample 06	4	Hunt Group	Admin Department
<input type="checkbox"/> Hunt Group Sample 07	3	Basic ACD	Operations Department
<input type="checkbox"/> Hunt Group Sample 08	6	Basic ACD	None
<input type="checkbox"/> Hunt Group Sample 09	5	Premium ACD	None
<input type="checkbox"/> Hunt Group Sample 10	8	Basic ACD	HR
<input type="checkbox"/> Hunt Group Sample 11	3	Hunt Group	CSR
<input type="checkbox"/> Hunt Group Sample 12	15	Basic ACD	Operations Department
<input type="checkbox"/> Hunt Group Sample 13	10	Hunt Group	None
<input type="checkbox"/> Hunt Group Sample 14	6	Hunt Group	HR
<input type="checkbox"/> Hunt Group Sample 15	12	Hunt Group	Executives
<input type="checkbox"/> Hunt Group Sample 16	6	Hunt Group	VIP
<input type="checkbox"/> Hunt Group Sample 17	5	Hunt Group	Guests
<input type="checkbox"/> Hunt Group Sample 18	2	Hunt Group	Marketing Department

Figure 19: Hunt Groups screen

On this screen, the BG Administrator can:

- select one or more Hunt Groups using the check-boxes and move the selected Hunt Group(s) between departments using the drop-down.
- click on a Hunt Group to access the configuration screen for that Hunt Group.

On the configuration screen for an individual Hunt Group, the BG Admin can:

- view details of Hunt Group Pilots and Hunt Group Members and access the configuration options for the member lines in the Hunt Group.
- add or remove member lines, or change the position of member lines within the group.
- change settings, including:
 - the name of the Hunt Group.
 - whether new members can explicitly log in or log out of it by default
 - the call distribution algorithms.

4.2.2 Call Pickup Groups

Incoming calls to a Business Group Line that is a member of a **Call Pickup Group** can be answered by any other member of the Call Pickup group, who simply presses a key to connect to that call.

The **Call Pickup Groups** page lists all of the Call Pickup Groups in the Business Group fragment or selected department (not including those in sub-departments).

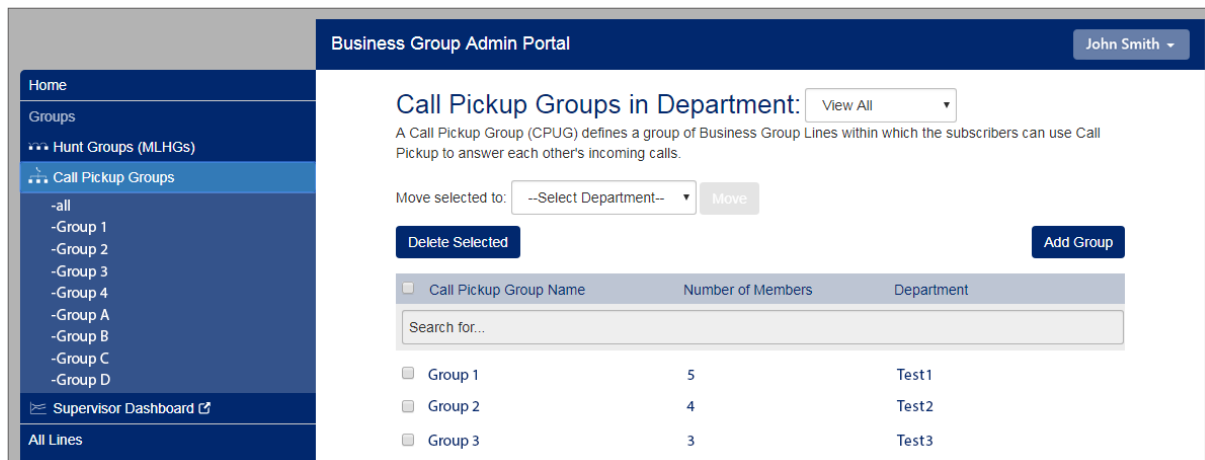


Figure 20: Call Pickup Groups screen

On this screen, the BG Admin can:

- view all the currently-configured Call Pickup Groups.
- add or delete Call Pickup Groups.
- click on a Call Pickup Group to access the configuration screen for that Call Pickup Group.

On the Call Pickup Group Configuration screen, the BG Admin can:

- add or remove lines from the Call Pickup Group.
- access the configuration options for the member lines in the Call Pickup Group.
- access a Settings screen where they can change the name of this Sim-Ring Group.

4.2.3 Supervisor Dashboard

If your deployment includes AirePBX Call Center, BG Admins who are also AirePBX Call Center Supervisors can access the Supervisor Dashboard directly from the CommPortal BG Admin UI.

AirePBX Call Center is a separately-licensed CommPortal component that provides BG Administrators with detailed information about the activity of the MLHGs that they are managing.

If the BG Admin is also a Supervisor, they will see the **Supervisor Dashboard** link on the CommPortal BG Admin UI. Clicking this link launches a new browser window that enables the administrator to view a range of graphs for all the MLHGs that they administer (Department Administrators will only see their department and, if configured, sub-departments).

BG Administrators will also be able to use this window to manage a number of additional supervisory features for monitoring MLHG members, including the ability to listen in on or participate in an MLHG member's call. BG Administrators who are also Supervisors will also be able to use this screen to launch the Report Scheduler to generate and schedule reports on MLHG activity.

4.3 Working with lines and phones

4.3.1 Business Group and Department Lines

The **Lines** page displays all the lines in the selected Department, using icons to indicate lines of a particular type.

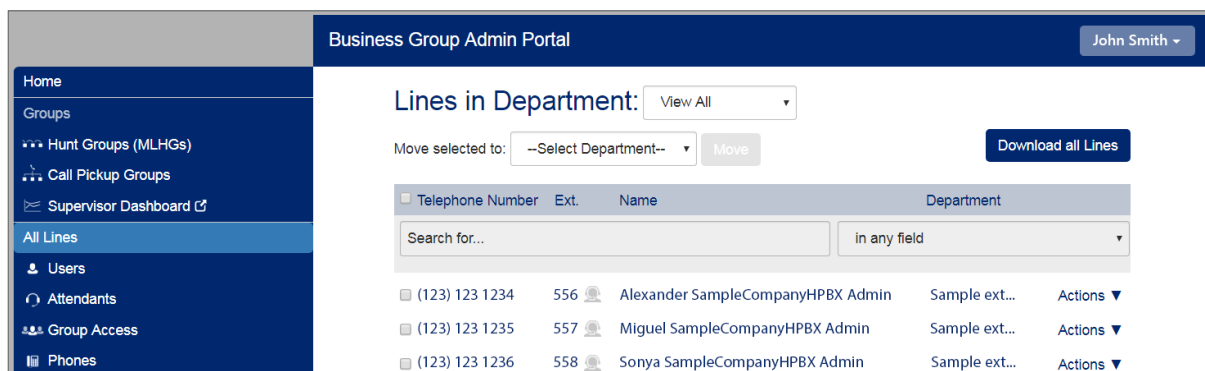


Figure 21: Lines screen

There are a range of options on these pages.

On the main Lines page, the BG Admin can use the Download all Lines button to download a .csv file which contains information about all the lines in this Business Group. This .csv file contains the name, DN and department of each line, ordered by the department to which the lines belong.

On all the pages, the BG Admin can use the Search for text box to search for any value in the table to find a particular line.

- The search will be restricted to the Department selected at the top of the screen. Selecting **View All** opens a drop-down which displays a list of Departments, along with a search facility. When the **View All** option is selected, a Department column is shown in the results table so that the administrator can easily see where the line is located.
- The drop-down box on the right of the search field enables the BG Administrator to specify whether the search should be applied either in any field or just to a specific column.
- The information of each column will be checked against the characters entered in the textbox, and just the lines that have matches are shown with the relevant matches highlighted. The list is updated as the characters are entered.
- The BG Administrator can also use the search facility to list all the administrators in the selected Department, by entering `admin` in the search textbox.

The BG Admin can use the Actions dropdown alongside a line to:

- View individual settings for that line.
- Edit personal details for that line, including changing the name and designating the line as a BG Administrator.
- Add services for the line. This launches a pop-up where the BG Admin can subscribe the line to additional call services, for example Call Blocking.
- Reset line. Clicking this link enables the BG Administrator to allocate this line to a different subscriber. See Resetting a Business Group line on page 53 for more information.
- Unlock account. Clicking this link enables the BG Administrator to unlock a line, for example if a subscriber has incorrectly entered their PIN or password multiple times and been locked out, or a BG Administrator has previously locked the line so that it cannot be used. This option is only displayed if the action to unlock an account is enabled in the CommPortal customization.

4.3.1.1 Resetting a Business Group line

How to reset a Business Group line so that it can be used by another subscriber.

The Reset Line option on the Lines page allows the BG Administrator to allocate the selected line to a different subscriber. Resetting a line removes all the current data associated with the line, including any call lists.

Lines in Department:

View All

Move selected to:

--Select Department--

Move

Download all Lines

<input type="checkbox"/> Telephone Number	Ext.	Name	Department
<div>Search for...</div> <div>in any field</div>			
<input type="checkbox"/> (123) 123 1234	556	Alexander SampleCompanyHPBX Admin	Sample ext... Actions
<input type="checkbox"/> (123) 123 1235	557	Miguel SampleCompanyHPBX Admin	Sampl View individual settings
<input type="checkbox"/> (123) 123 1236	558	Sonya SampleCompanyHPBX Admin	Sampl Edit personal details
<input type="checkbox"/> (123) 123 1237	559	Tin SampleCompanyHPBX Admin	Sampl Reset line
<input type="checkbox"/> (123) 123 1238	560	Norman SampleCompanyHPBX Admin	Sampl ext... Unlock account

Figure 22: Resetting a Business Group line

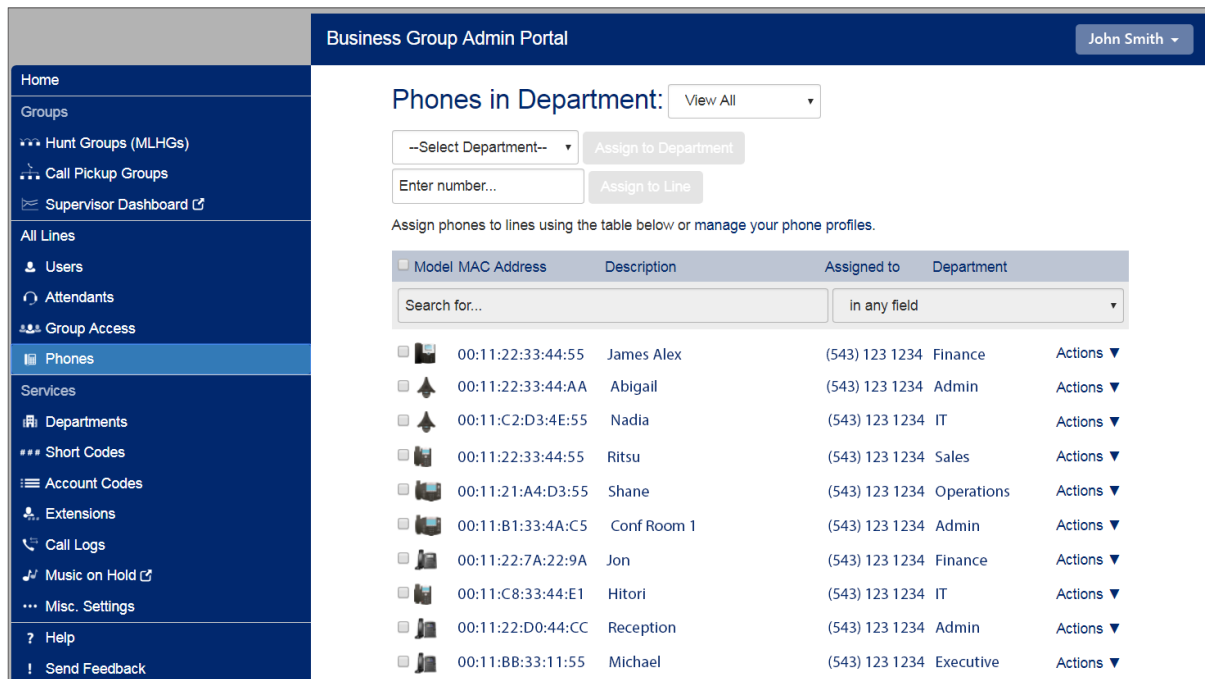
To reset a Business Group line:

- On the BG Admin Lines page, the BG Administrator clicks the Actions menu drop-down alongside the line, then selects the Reset line.
- This launches a pop-up with the telephone number for the line pre-populated, where the BG Administrator can enter the following information.
 - The new account name.
 - Whether to use the account name as the local calling name (this option is checked by default).
 - Whether to remove the line from all groups (this option is checked by default).
- The BG Administrator then clicks **Apply**. They will see a confirmation pop-up warning them that this action will lose all data for the line and cannot be undone. Clicking **Confirm** resets the line, or Cancel aborts the change.
- The BG Administrator then sees a New User Details pop-up showing the new account name, directory number and all PINs/passwords. These passwords will be set to randomly generated numeric or alphanumeric sequences.
- The BG Administrator can then copy and paste this information into an email and send it to the new user.
- The new account will be uninitialized and the subscriber will need to set a new TUI PIN/CommPortal password and record a spoken name and initial greeting when they log in for the first time.

4.3.2 Business Group Phones

BG Administrators can assign phones to lines in the Department or Business Group, and click a link to launch the CommPortal Phone Configurator where they can view and make changes to phone profiles.

The **Phones** page lists all the SIP phones in the Business Group or Business Group fragment or selected department.



Business Group Admin Portal John Smith ▾

Home

Groups

- *** Hunt Groups (MLHGs)
- *** Call Pickup Groups
- ✉ Supervisor Dashboard

All Lines

- Users
- Attendants
- Group Access
- Phones**

Services

- Departments
- Short Codes
- Account Codes
- Extensions
- Call Logs
- Music on Hold
- Misc. Settings
- Help
- Send Feedback

Phones in Department: View All ▾

--Select Department-- ▾ Assign to Department

Enter number... Assign to Line

Assign phones to lines using the table below or [manage your phone profiles](#).

<input type="checkbox"/>	Model	MAC Address	Description	Assigned to	Department	
<input type="checkbox"/>		00:11:22:33:44:55	James Alex	(543) 123 1234	Finance	Actions ▾
<input type="checkbox"/>		00:11:22:33:44:AA	Abigail	(543) 123 1234	Admin	Actions ▾
<input type="checkbox"/>		00:11:C2:D3:4E:55	Nadia	(543) 123 1234	IT	Actions ▾
<input type="checkbox"/>		00:11:22:33:44:55	Ritsu	(543) 123 1234	Sales	Actions ▾
<input type="checkbox"/>		00:11:21:A4:D3:55	Shane	(543) 123 1234	Operations	Actions ▾
<input type="checkbox"/>		00:11:B1:33:4A:C5	Conf Room 1	(543) 123 1234	Admin	Actions ▾
<input type="checkbox"/>		00:11:22:7A:22:9A	Jon	(543) 123 1234	Finance	Actions ▾
<input type="checkbox"/>		00:11:C8:33:44:E1	Hitori	(543) 123 1234	IT	Actions ▾
<input type="checkbox"/>		00:11:22:D0:44:CC	Reception	(543) 123 1234	Admin	Actions ▾
<input type="checkbox"/>		00:11:BB:33:11:55	Michael	(543) 123 1234	Executive	Actions ▾

Figure 23: Phones screen

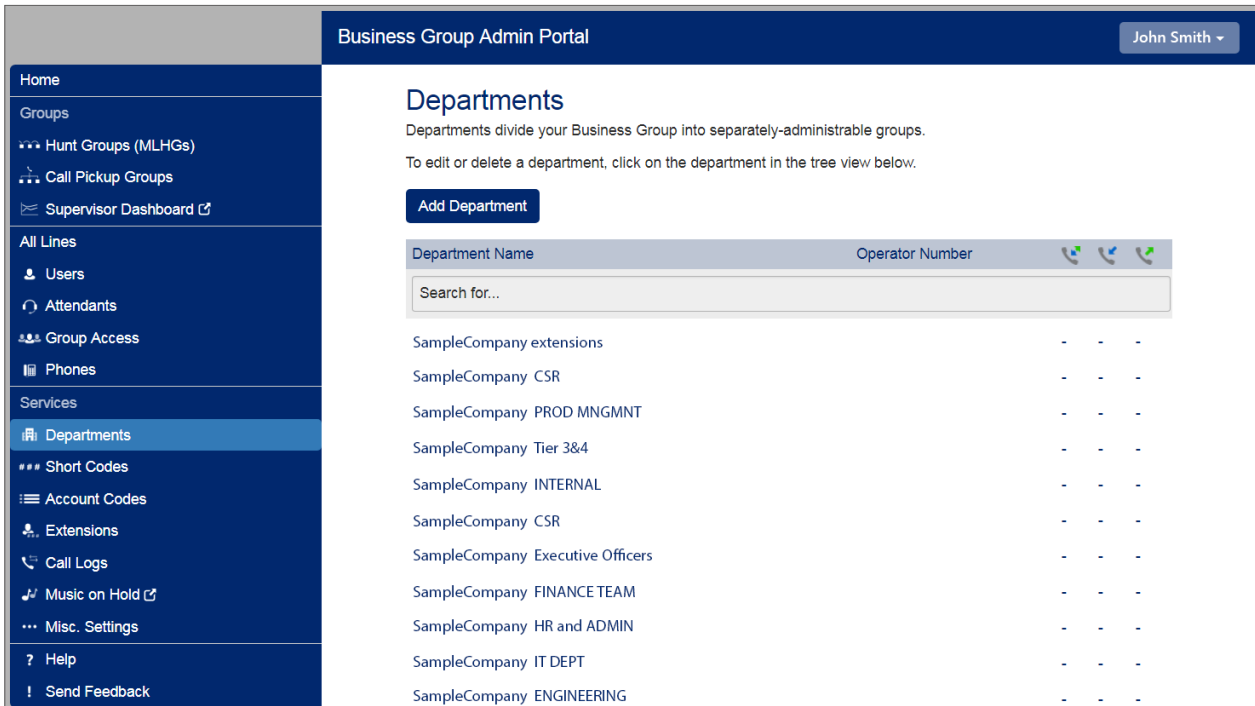
The BG Admin can:

- view the status of all the phones in the selected Department - the question mark icon indicates if a phone is not currently able to be used, for example because the phone has not been authenticated.
- use the checkbox to select a phone or click on the phone and then assign it to a department or line.
- click on the phone icon to launch a pop-up to change the phone configuration.
- click on the Actions menu to change or configure the phone.
- click on the manage your phone profiles to launch the CommPortal Phone Configurator.

4.4 Working with Business Services

4.4.1 Business Group Departments

On the **Departments** screen, the BG Administrator can view details of all the Departments for which they are an administrator, and also add new departments.



Business Group Admin Portal John Smith ▾

Departments

Departments divide your Business Group into separately-administrable groups.

To edit or delete a department, click on the department in the tree view below.

[Add Department](#)

Department Name	Operator Number			
Search for...				
SampleCompany extensions	-	-	-	
SampleCompany CSR	-	-	-	
SampleCompany PROD MNGMT	-	-	-	
SampleCompany Tier 3&4	-	-	-	
SampleCompany INTERNAL	-	-	-	
SampleCompany CSR	-	-	-	
SampleCompany Executive Officers	-	-	-	
SampleCompany FINANCE TEAM	-	-	-	
SampleCompany HR and ADMIN	-	-	-	
SampleCompany IT DEPT	-	-	-	
SampleCompany ENGINEERING	-	-	-	

Figure 24: Departments screen

The BG Admin can use the **Search for ...** box to find a particular Department. If you have a very large Business Group with a lot of Departments, this search will only show up to 1,000 Department matches.

The BG Admin can click on any of the existing departments on this screen to launch a pop-up where they can:

- rename the department.
- enter or change the operator number for the department.
- set limits on the number of incoming and outgoing calls that the department can make.

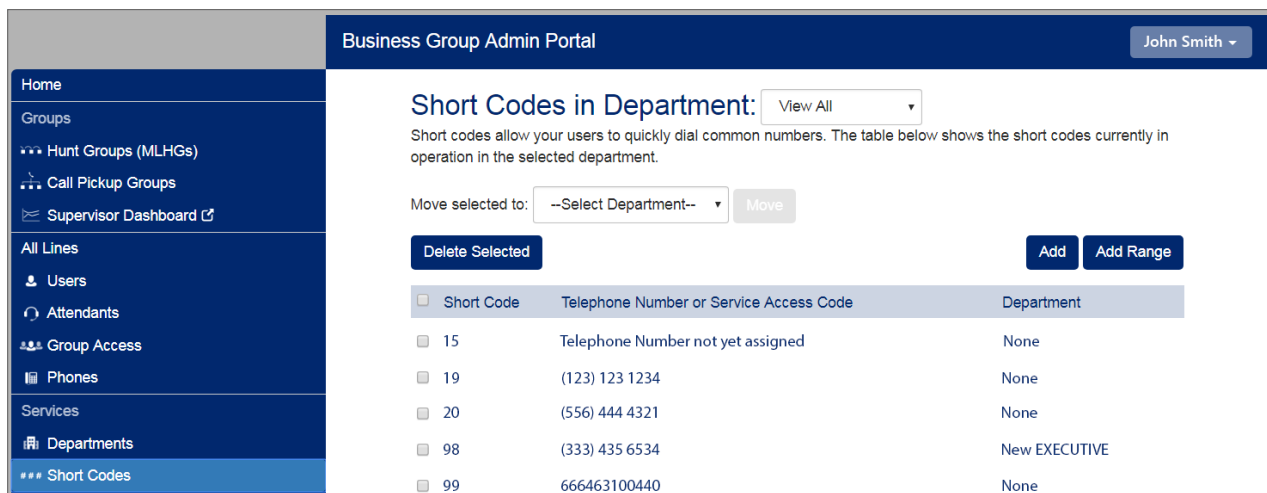
Attention:

If you rename a department, you will no longer be able to filter call logs based on the previous name of the department. You can only access call data from the department prior to its renaming by selecting department Any when setting the parameters for call activity reports or downloading call logs.

4.4.2 Business Group Short Codes

Short Codes allow subscribers to call a number by dialing the short code rather than the whole number.

On the **Short Codes** screen, the BG Admin can see all of the Short Codes in the Business Group fragment or selected department (not including those in sub-departments).



Business Group Admin Portal John Smith ▾

Home
Groups
Hunt Groups (MLHGs)
Call Pickup Groups
Supervisor Dashboard

All Lines
Users
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Group Access
Phones
Services
Departments
Short Codes

Short Codes in Department: View All ▾

Short codes allow your users to quickly dial common numbers. The table below shows the short codes currently in operation in the selected department.

Move selected to: --Select Department-- ▾ Move

Delete Selected Add Add Range

Short Code	Telephone Number or Service Access Code	Department
<input type="checkbox"/> 15	Telephone Number not yet assigned	None
<input type="checkbox"/> 19	(123) 123 1234	None
<input type="checkbox"/> 20	(556) 444 4321	None
<input type="checkbox"/> 98	(333) 435 6534	New EXECUTIVE
<input type="checkbox"/> 99	666463100440	None

Figure 25: Short Codes screen

The BG Admin can:

- move a selected Short Code to another Department.
- select a Short Code and delete it.
- add a single Short Code or a range of Short Codes.
- click on an existing Short Code to launch a pop-up where they can edit it.

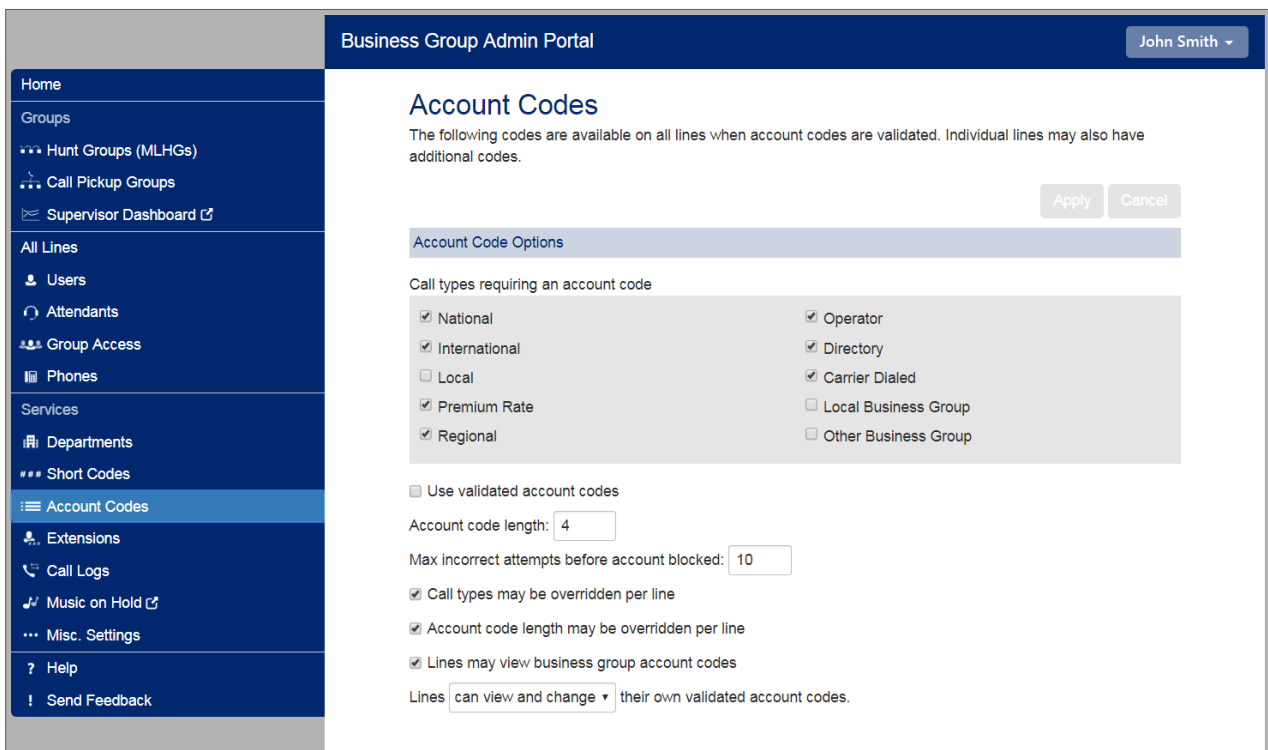
4.4.3 Business Group Account Codes

The BG Administrator can configure the Business Group's Account Code settings, and create and edit a list of Validated Account Codes.

Note:

Only the root BG Administrator for the whole Business Group fragment can access the Account Codes page.

On the **Account Codes** screen, the BG Administrator can see which types of call require an account code to be entered before they can be made, and, if account codes have been assigned, a list of these account codes.



Business Group Admin Portal John Smith ▾

Account Codes

The following codes are available on all lines when account codes are validated. Individual lines may also have additional codes.

Apply Cancel

Account Code Options

Call types requiring an account code

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

☐ Use validated account codes

Account code length:

Max incorrect attempts before account blocked:

☒ Call types may be overridden per line

☒ Account code length may be overridden per line

☒ Lines may view business group account codes

Lines their own validated account codes.

Figure 26: Account Codes screen

On this screen, the BG Admin can:

- edit the list of assigned account codes.
- use the checkboxes to mark which call types require account codes.
- choose whether or not to use validated account codes (so that subscribers must enter a specific code before making a call of a particular type).
- set the account code length (1-15 characters).

- set the maximum number of incorrect attempts to enter an account code before the account is blocked (1-100 attempts).
- choose whether or not call types and Account Code length can be overridden on a per line basis.
- choose whether or not Business Group Lines can view and change their own account codes.

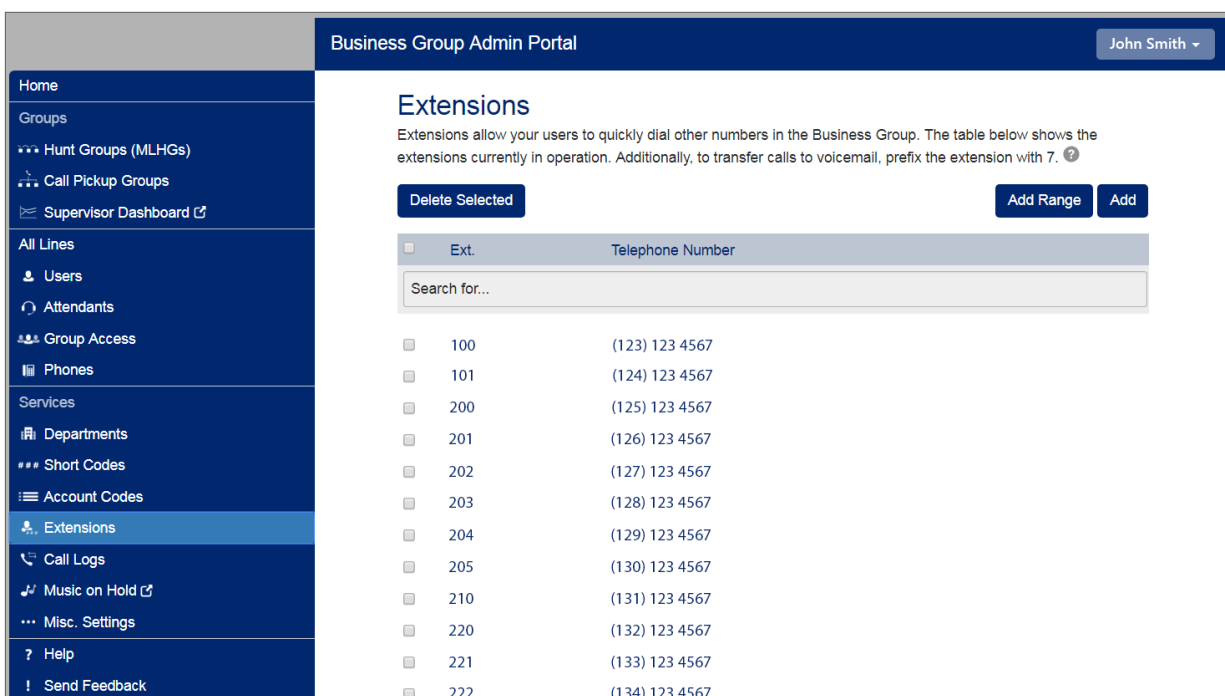
4.4.4 Business Group Extensions

The root BG Administrator can view and configure the extensions that can be used in their Business Group or Department.

Note:

Only the root BG Administrator for the whole Business Group fragment can access the Extensions page.

On the Extensions screen, the root BG Administrator can see all the extensions that are currently configured in the Business Group or Department. These extensions can be used to quickly dial other numbers in the Business Group.



Business Group Admin Portal John Smith ▾

Extensions

Extensions allow your users to quickly dial other numbers in the Business Group. The table below shows the extensions currently in operation. Additionally, to transfer calls to voicemail, prefix the extension with 7. ?

Delete Selected Add Range Add

<input type="checkbox"/>	Ext.	Telephone Number
Search for...		
<input type="checkbox"/>	100	(123) 123 4567
<input type="checkbox"/>	101	(124) 123 4567
<input type="checkbox"/>	200	(125) 123 4567
<input type="checkbox"/>	201	(126) 123 4567
<input type="checkbox"/>	202	(127) 123 4567
<input type="checkbox"/>	203	(128) 123 4567
<input type="checkbox"/>	204	(129) 123 4567
<input type="checkbox"/>	205	(130) 123 4567
<input type="checkbox"/>	210	(131) 123 4567
<input type="checkbox"/>	220	(132) 123 4567
<input type="checkbox"/>	221	(133) 123 4567
<input type="checkbox"/>	222	(134) 123 4567

Figure 27: Extensions screen

Download Logs

Clicking the Call Logs tab launches the following screen.


Call Logs

Call Logs are presented in a CSV report listing the calls to and from lines in your administration domain. Use the filtering options to specify a date range or to restrict the report to calls to and from lines in a given department.

Filter configuration


Enter start and end dates to request logs of calls made within a specific period of time:

Start date:



monthdayyear

End date:



monthdayyear

Select the department whose calls should be included in the report. Note that the report will include calls to and from lines in the selected department and its sub-departments.

New HR

Download

Figure 28: Call Logs screen

On this screen, the BG Admin can:

- request a report in .csv format containing the logs of all calls made (up to a month at a time) to and from lines within their administration domain (whole business group or department and subdepartments), including calls to MLHGs within the Business Group or department.
- filter call logs specifying a date range, and/or by department domain if the Business Group has them.

Error messages are displayed if any of these filters are set to incorrect values. The UI will validate these filters once the Download button is clicked, and then display a dialog box while the report downloads. The BG Admin cannot access the main page or navigate to another page during this process, although they can cancel the operation.

Attention:

If this Business Group has over 10,000 lines, the BG Admin must filter the call logs by selecting a Department. It is not possible to download call logs for the entire Business Group in a single operation.

Once downloaded, the .csv report files can be opened in a spreadsheet application such as Microsoft Excel.

The downloaded report contains the date and time of each call made or received, in the configured time zone of the administrator requesting the download.

4.4.5 Music on Hold and Auto Attendant

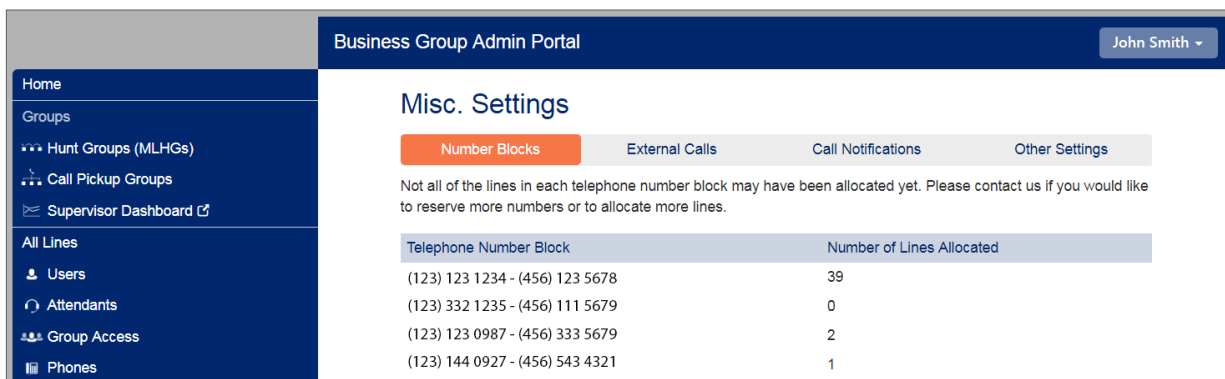
The BG Administrator can click on the Auto Attendant and Music On Hold links to configure these services. This will open a new window containing the appropriate configuration interface.

4.4.6 Business Group Miscellaneous Settings

On the Misc Settings screen, the BG Admin can see the Number Blocks screen, and click additional tabs to view External Call, Call Notifications and Other Settings screens.

Number Blocks

On the **Number Blocks** screen, the BG Admin can see a list of the Telephone Number Blocks in their Department or Business Group, and the number of lines that are currently allocated in each block.



Business Group Admin Portal John Smith ▾

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Groups

- Hunt Groups (MLHGs)
- Call Pickup Groups
- Supervisor Dashboard

All Lines

- Users
- Attendants
- Group Access
- Phones

Misc. Settings

Number Blocks External Calls Call Notifications Other Settings

Not all of the lines in each telephone number block may have been allocated yet. Please contact us if you would like to reserve more numbers or to allocate more lines.

Telephone Number Block	Number of Lines Allocated
(123) 123 1234 - (456) 123 5678	39
(123) 332 1235 - (456) 111 5679	0
(123) 123 0987 - (456) 333 5679	2
(123) 144 0927 - (456) 543 4321	1

Figure 29: Business Group Misc Settings Number Blocks screen

External Calls

On the External Calls screen, the BG Admin can see if there are any limits on calls made outside of the Business Group or Department as well as the codes set for local, long distance and international carriers.

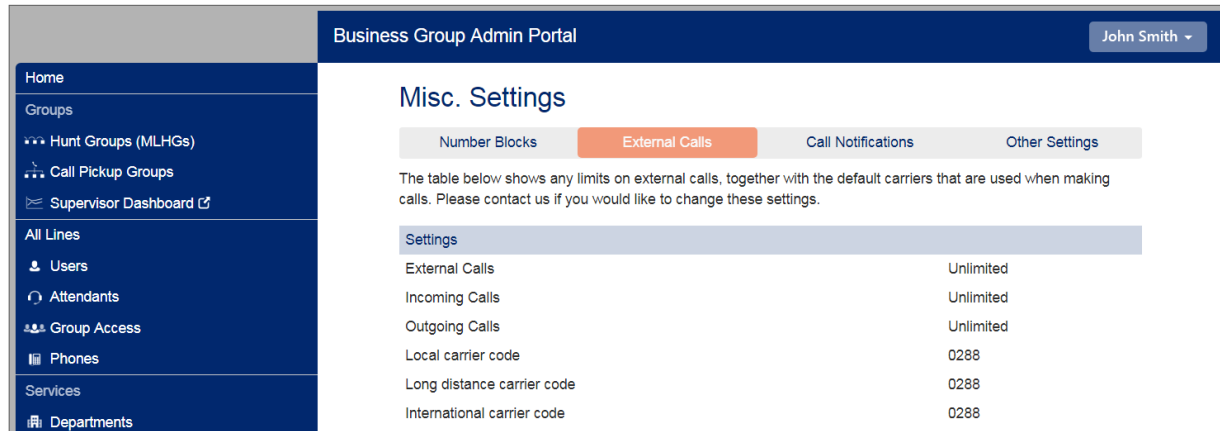


Figure 30: Business Group External Calls Settings screen

Call Notifications

The BG Administrator can use the Call Notifications screen to enable or disable Emergency Call Notifications and, if these notifications are enabled, configure the targets who will receive either an email or outdial notification whenever an emergency call is made by one of the lines in the Business Group.

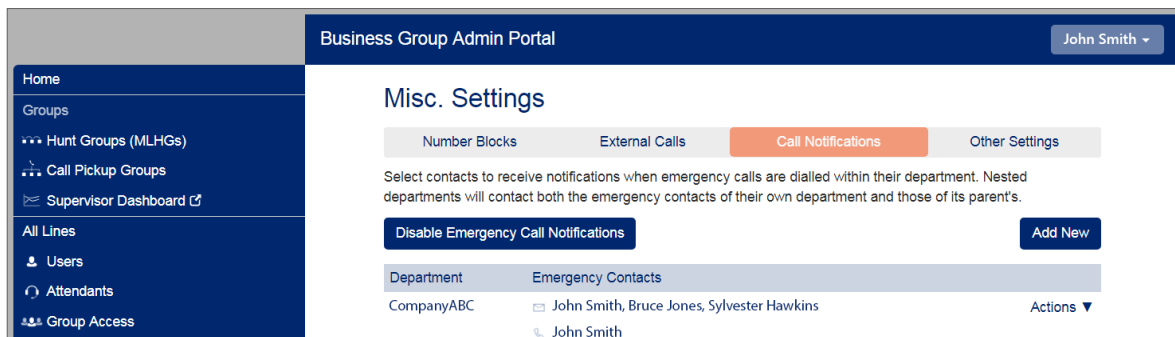


Figure 31: Business Group Misc Settings Emergency Call Notifications screen

The root BG Administrator can click **Disable Emergency Call Notifications** to turn call notifications off. When Call Notifications are disabled, this button displays **Enable Emergency Call Notifications**.

On this screen, the BG Admin can:

- view the Call Notifications which are already configured.
- use the **Add New** button to launch a pop-up illustrated below, where they can select a Department and add details for the recipients who should receive either an email or a telephone call whenever a line in that Department makes an emergency call.
- use the **Actions** drop-down alongside a Department to edit the existing lists for that Department or to clear them. Clicking on **Edit** launches the same pop-up as the **Add New** button.

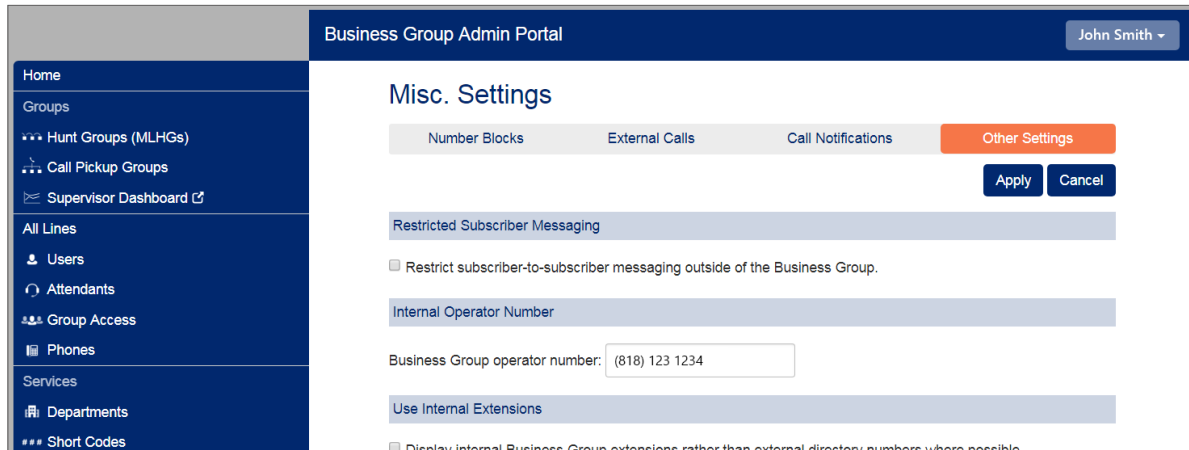


Figure 32: Other Settings screen

Other Settings

On the Other Settings screen, the BG Admin can configure the following options.

- Restricted Subscriber Messaging - set whether members of this Business Group can send messages only to other members of the same Business Group.
- Internal operator number - enter the number used to access this Business Group's operator.
- Use Internal extensions - choose whether or not CommPortal displays the Business Group extension number associated with a directory number where possible.