- Select Contacts from the folder tree and click Next

- Save exported file as 'Outlook Contacts' and click Next – save in a place you can remember like the Desktop or My Documents

- Go back to the CommPortal Contacts tab

- Click the Import button

- Click the Browse button to find the 'Outlook Contacts' file

- Click Import

- Your contacts are now in CommPortal!

CALL MANAGER

The **Call Manager** tab is where you view or change the calling rules you have in place.

Summary provides a quick view of your Call Manager settings.

Rule enables you to create rules based on who is calling. For instance, you may want to have calls from your address book managed differently than someone outside your contacts.

Weekly Schedule CommPortal gives you the ability to set up call handling based on time of day or day of week. This is an optional feature.

SETTINGS

To change your password and/or PIN, click on the **Security** tab.

The **Preferences** tab allows you to make additional changes in call forwarding and caller ID Preferences.

The **Messaging** tab enables you to receive a notification of a voicemail as an email, manage mailbox settings, customize how you are notified of a voicemail, configure greetings, and more. From Greetings, you can personalize your voicemail greeting by recording an announcement (a microphone is required).

The **Phones tab** enables you to configure your phone according to your preferences. Once you configure your phone, you should not need to use this tab frequently.

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Hosted PBX
Quick Start Guide

WELCOME

Welcome to Hosted PBX! This guide is intended to get you up-and-running for the basic features associated with the product. For more in-depth information, please see: *Hosted PBX End User's Guide, Hosted PBX Administrator's Guide.*

As always, you can contact our local customer care team at your customer care number 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
- And many others

To get started, go to the login page at: t http://portal.yourcompany.com. Use your 10 digit phone number as your user name and xxxx as the default password. Once you login in, see page 9 to create a new password.Please note that this Guide is representative and may vary from your individual CommPortal screen.

GETTING ORIENTED

Once you are logged in, you will be on the main CommPortal screen:

Message, missed call indicators
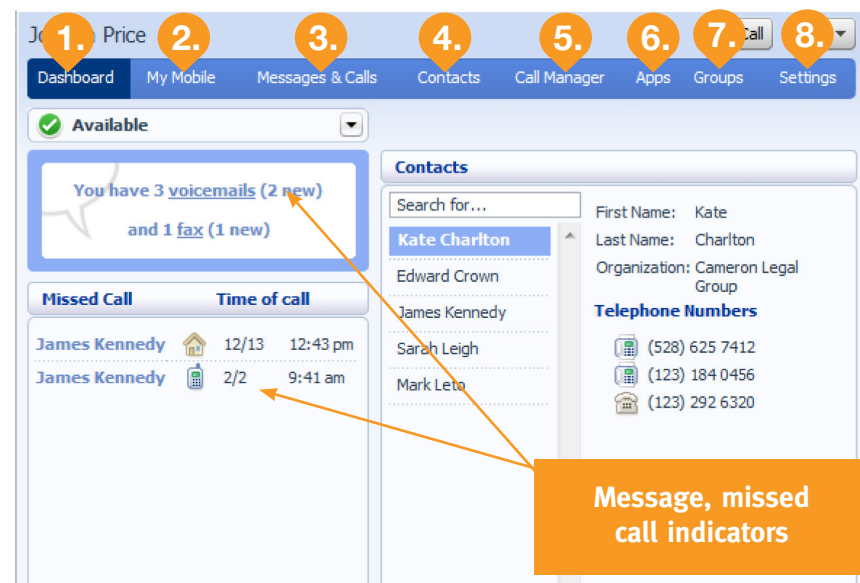
1. **Dashboard** – Quick view of most common functions
2. **My Mobile** – unify your HPBX and Mobile Voice Mail boxes
3. **Messages and Calls** – Access call history
4. **Contacts** – Store and retrieve contact information
5. **Call Manager** – Manage how your incoming calls are managed
6. **Apps** – Add any applications to your service
7. **Group** – See what groups you are a part of
8. **Settings** – Change your call settings

DASHBOARD

CommPortal Dashboard is the main screen for the portal. On it, you can view things such as recent calls, messages, contacts, and customized settings.
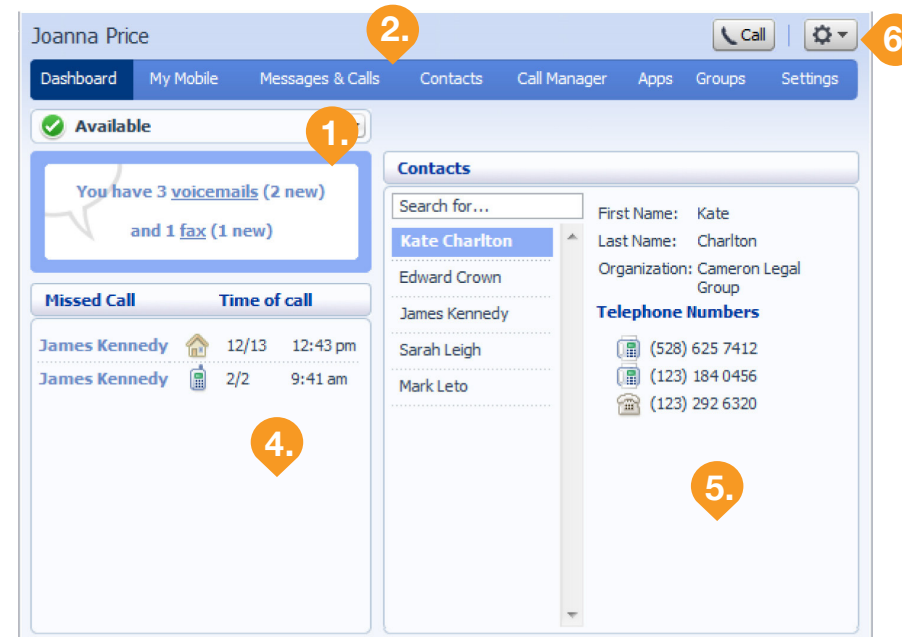
1. **Voicemails** – click this area to view and retrieve any voicemails
2. **Contacts** – import your contacts from Outlook or create new ones, then click on their name to dial
3. **Use the 'Call' button to make a new call** – use for numbers that may not be in your address book
4. **List of missed calls** – if you click one you will have the option of calling the number back
5. **Active settings** – for instance, if you are forwarding your number, it would appear here – click to adjust
6. **Settings** – Logout, Refresh or scroll to Help where help pages are visible and step-by-step tutorials describe how to perform tasks within a user's CommPortal

MESSAGES AND CALLS
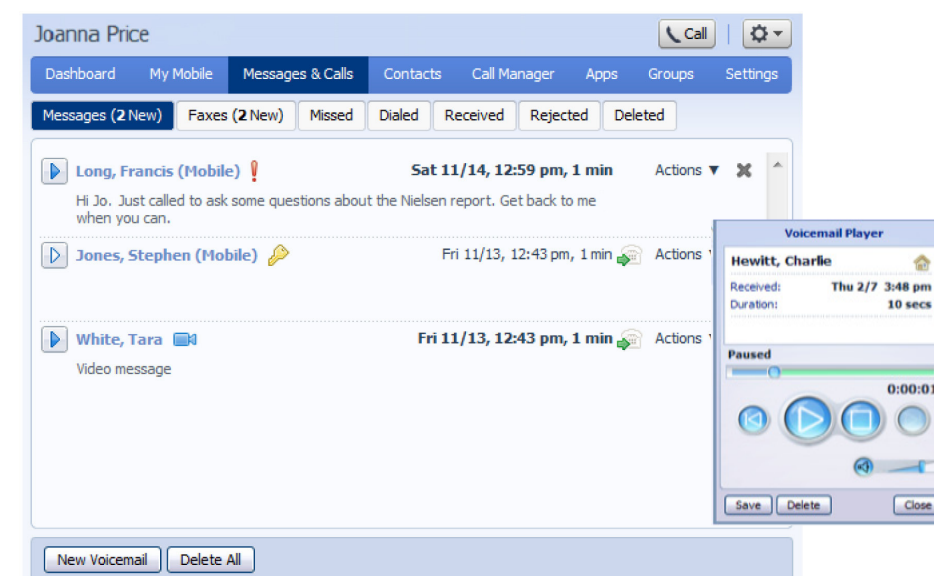
The **Messages and Calls** tab displays all the recent call activity you have had. Here you can retrieve voicemails and view calls based on whether they were missed, answered, dialed, or deleted.

Click on one of the sub-tabs to get more detail. Click the 'play' arrow button to listen to a voicemail. Note that you can listen to your voicemails in any order. The window (seen to the right above) will open – you will have the option to save or delete either on the player screen or main screen.

Click the 'New Voicemail' button at the bottom of the page to record and leave a voicemail as a memo (note – your computer requires a microphone).

Click the ▼ at the end of the line to mark as Heard (or) New, Forward as Email, or Forward as Voicemail.

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.

CONTACTS

The **Contacts** tab 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.

Set up short codes using this button

Create new contacts, groups, import, or export using these buttons
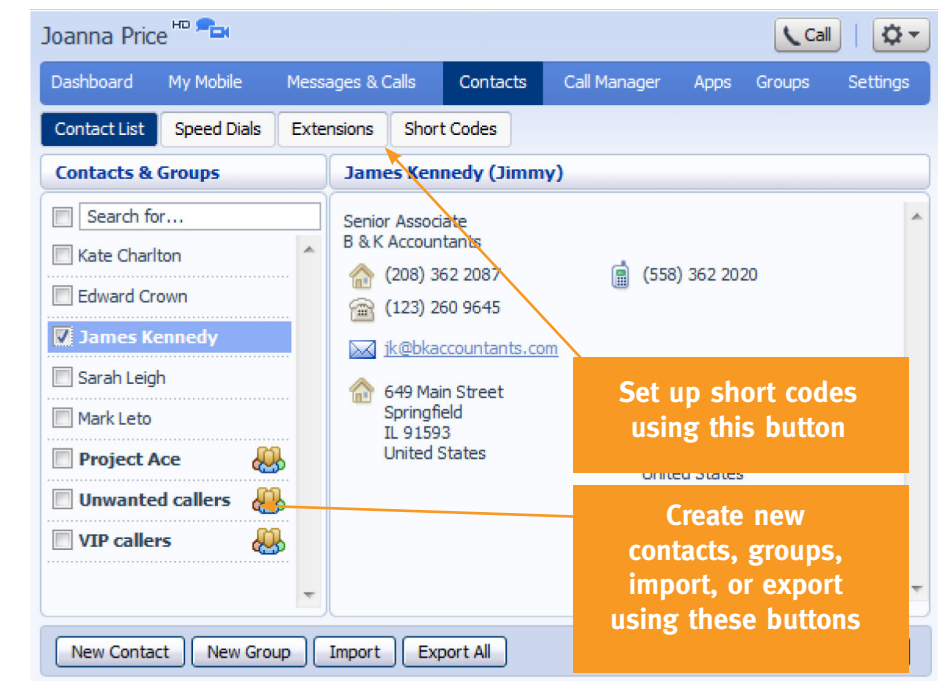
The fastest way to add your contacts is to import them from your email program. If you're using Microsoft Outlook, here's how:

- 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