

CommPortal Portal Guide

The User Portal is available at <https://userportal.appiaservices.com>. Please contact Appia Support at 877-277-4297, option 3, or support@appiaservices.com if you need login information.

Contents

Getting Started.....	3
Help.....	3
Dashboard.....	4
Messages and Calls	4
Voicemail.....	4
Call Logs	5
Voicemail to Email and Voicemail Notification.....	5
Contacts	5
Contact List	5
Contacts	5
Groups.....	6
Speed Dials.....	6
Extensions	7
Short Codes	7
Call Manager for Standard Desktop Users.....	8
Incoming Call Settings.....	9
Ring Your Account Phone.....	9
Ring Your Phones in Order	9
Ring Your Phones Together.....	11
Forward to another Phone.....	12
Advanced Settings.....	12
Forward Selected	13
Reject Selected.....	13
Forward If Unavailable.....	14
Anonymous Calls.....	14
Call Manager with Time of Day Routing	14

Basic Settings	14
Advanced Settings.....	15
Creating Rules	15
Example Ruleset 1 – Forward VIP callers to Cell, send other callers to Voicemail	17
Example Ruleset 2 – Block Callers from a Specific Number.....	20
Applying Rules.....	20
Time of Day Configuration	21
Enabling Time of Day Rules.....	22
Apps	23
Settings.....	23
Account	23
Messages.....	23
Voicemail to Email.....	24
Mailbox Access.....	24
Voicemail Greeting.....	24
Account Codes	25
Notifications.....	25

Getting Started

When you first log in to the Appia User Portal (CommPortal), you will see the Dashboard tab. The user Portal is organized into six tabs:



1. **Dashboard** – Quick view of most common functions
2. **Messages and Calls** – Access call history
3. **Contacts** – Store and retrieve contact information
4. **Call Manager** – Manage how your incoming calls are managed
5. **Apps** – Add applications to your service
6. **Settings** – Change your call settings.

Help

You can access the Help menu at any time by:

1. Clicking on the Settings button
2. Choosing Help from the drop-down menu.



Dashboard

The Dashboard is the main screen for the Portal. Note that the Dashboard looks slightly different if your account has Call Manager with Time of Day Routing enabled. The only difference is that the active settings window is at the bottom of the right hand side of the page, and only links to your Call Manager settings, rather than allowing changes on the Dashboard page.



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 a name to dial
3. **'Call' Button** – Use to make new calls to numbers that may not be in your address book
4. **List of Missed Calls** – Click any missed call to call the number back
5. **Active Settings** – For instance, if you are forwarding your number, that information would appear here – You can click on this to make changes.
6. **Settings** – Logout, Refresh or scroll to Help where help pages are visible and step-by-step tutorials describe how to perform tasks within the user Portal.

Messages and Calls

The Messages and Calls tab displays all recent call activity. Here you can retrieve voicemails and view missed, received, or dialed call logs, or deleted voicemails before they are purged.

Voicemail

Click the 'play' arrow button to the left of a message to listen to a voicemail. Note that you can listen to your voicemails in any order. A player window (as shown over the Messages and Calls screen) will open and 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 send a voicemail to someone else (your computer must have a microphone to use this function).

Click the Actions dropdown on any voicemail message to send a recorded reply, mark it as Heard (or New), Forward the message as an Email, or Forward a message as a Voicemail.

Call Logs

From the Missed, Dialed, and Received tabs you can click on the name of a caller and either call them, add them to your contacts, or jump to the caller's existing contact information.

Voicemail to Email and Voicemail Notification

These options are configured under the Settings tab. Please see that section of the guide for details.



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.

Contact List

Contacts

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

1. Open Outlook and go to the 'File' tab – then 'Import and Export.'
2. A new window should appear.
3. Select Export to File – click Next.
4. Select Comma Separated Values from the list and click Next.
5. Select Contacts from the folder tree and click Next.
6. Save exported file as 'Outlook Contacts' and click Next – save in a place you can easily locate such as the Desktop or My Documents.
7. Go back to the Appia User Portal Contacts tab.
8. Click the Import button.

9. Click the Browse button to find the 'Outlook Contacts' file.
10. Click Import.
11. Your contacts are now in the User Portal.

You can also add Contacts using the New Contact button. Fill in all of the fields after clicking the New Contact button and click the Save button. After a contact is saved, you can add it to a group. Click on the checkbox of a single contact to see the details of that contact or edit the contact. Click on the checkbox of one or more contacts to delete them using the Delete button.

Groups

Contacts can be members of one or more groups. You can create a new group using the New Group button. Enter the group name and an optional two-digit Telephone ID. The Telephone ID is used to select the group from telephone based menus. Click the Save button to create the new group. Click on the checkbox of a group to see the contacts that are members of that group or to delete the group. Note that deleting a group does **not** delete the contacts within that group.



Speed Dials

The Speed Dials tab allows you to configure speed dials for use with your physical phone.

Add Speed Dial

1. To add a speed dial entry, simply choose the speed dial number (2-9 or 20-49) from the Speed Dial dropdown.
2. Enter the telephone number exactly as you would dial it on your phone. For example, if you dial 9 for external calls, include 9 when entering the number in this box.
3. Click the Add button, and then click the Apply button to save your changes.



Delete Speed Dial

Click the X to the right of the speed dial entry you wish to delete. Click the Clear List button if you want to delete **all** of your speed dials. Click the Apply button to save your changes.



Extensions

The Extensions tab displays all the extensions configured for your organization and includes a Search function to allow you to find a specific extension quickly. To add an extension to your organization, contact your company administrator or Appia support.

Short Codes

Short codes are company-wide speed dials that allow you to dial a commonly used number by dialing a two to five-digit number instead of the full telephone number. The Short Codes tab displays all the short codes configured for your organization and includes a Search function to allow you to find a

specific short code quickly. To add a short code to your organization, contact your company administrator or Appia support.

Call Manager for Standard Desktop Users

The Call Manager tab enables you to manage how incoming calls are routed to you. If you have added Time of Day routing to your account, please see the next section, Call Manager with TOD routing.

The top section enables you to change your setting from 'Available' to 'Do Not Disturb,' allowing you to route calls directly to voicemail if you're busy. There is also a forwarding option that enables simultaneous ring with your mobile device.

The following options are available:

1. **Do Not Disturb.** Click on the green status button to change your status between available and DND.
2. **Change what devices ring on inbound calls.** Configuration of these options is explained in the Incoming Call Settings section below. Options are:
 - Ring Your Account Phone
 - Ring Your Phones in Order
 - Ring Your Phones Together
 - Forward to Another Phone
3. **Control whether to forward your calls to a cell phone or voicemail if you do not answer your Appia phone or if you are on the phone.** You can also control how long to wait before forwarding on no answer. Click on the Cell link to configure your cell phone number in the Portal.
4. **Control Advanced Settings.** Advanced settings are explained in the Advanced Settings section below.



Incoming Call Settings

Incoming calls can be configured to use one of the following settings:

Ring Your Account Phone

This is the default option and will ring your Appia phone normally.

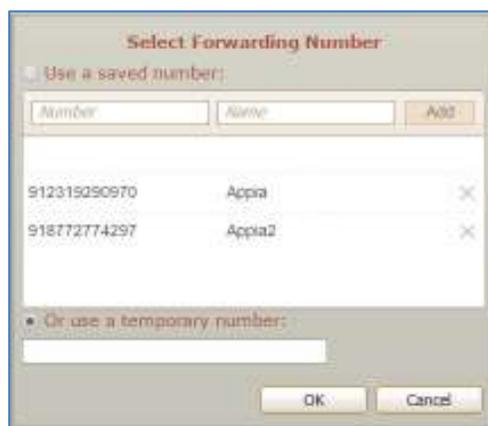
Ring Your Phones in Order

You can choose to ring any of your numbers in a specified order when you receive a call. When selected, 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:

1. Choose Ring Your Phones Together from the Incoming Calls dropdown menu.
2. Click the + button to add one or more additional phones to ring along with your Appia phone(s).



- Select or add the telephone number you want to add to the list. The telephone number must be entered exactly as you would dial it from your Appia phone.
- Click Apply to save.



3. Click the + button and select a saved phone number or temporary number from the Select forwarding number popup menu. A new row with that number will be added to the forwarding configuration. The row will display the name or number of the chosen phone (e.g. Work Mobile)
4. Add ringing periods (up to a maximum of six) to the table by clicking on a time period for the number you want to ring during that time period. Time periods are listed in columns next to the list of phone numbers. The time period for a phone will turn grey when that phone is selected to ring for that time period. In the example below, the Appia phone will ring for the first time period, and then the Account phone listed in row 2 will ring for the second time period. You can select multiple phones to ring within a time period by clicking on the same time period for multiple phones.



5. You can unselect a time period by clicking on it and clicking on the trash can icon.
6. You can adjust the duration of a time period by clicking on it and adjusting the ring duration listed for that position.



7. If you want to configure forward on no answer or forward on busy, select the option and configure the destination by clicking the link. Specify the total ring duration before forwarding for forward on no answer if selected. NOTE: If you do not configure these options, calls that reach the end of the time periods will forward to voicemail if you have it enabled on your account.
8. Click Apply at the bottom of the page to save changes.

Ring Your Phones Together

This option will simultaneously ring multiple phones. To configure:

1. Choose **Ring Your Phones Together** from the Incoming Calls dropdown menu.
2. Click the + button to add one or more additional phones to ring along with your Appia phone(s).



3. Select or add the telephone number you want to add to the list. The telephone number must be entered exactly as you would dial it from your Appia phone.
4. Click Apply to save.



Forward to another Phone

This option allows you to call forward all your calls to another number. To enable forwarding to another phone:

1. Choose Forward to Another Phone from the Incoming Calls dropdown menu.
2. Click on the link to select or enter the phone number to forward your calls to. The telephone number must be entered exactly as you would dial it from your Appia phone.
3. If you want your Appia phone to ring once to notify you when a call is forwarded to the alternate number, click the Notify Me When Calls Are Forwarded checkbox.
4. Click Apply to save.



Advanced Settings

Click on the Advanced Settings sidebar to expose advanced options. Click on the icon to the left of an option to enable and/or configure it. The available options are listed below. Click the Apply button to save any time you make changes to these settings.



Forward Selected

Forward Selected allows you to set up an alternate call forwarding rule for certain callers. If you need more advanced control of this feature, you can contact Appia to add CommPortal with Time of Day routing to your line.

1. Click on the Forward Selected icon to configure call forwarding for selected callers.
2. Click on the List link to configure the callers that will be forwarded to an alternate destination. Add callers by entering the 10-digit telephone number on the List tab or select contacts or extensions by click on the corresponding tab and checking the box of any contact or extension that should follow this alternate forwarding rule. Click the OK button when complete.



3. Click on the Another Phone link and configure the forwarding destination. Enter the number exactly as you would dial it on your Appia phone. Click OK when done.



Reject Selected

Reject Selected allows you to reject calls from specific callers. Callers on this list will receive an announcement that you will not take their call.

1. Click on the Reject Selected icon to configure call forwarding for selected callers.
2. Click on the List link to configure the callers that will be rejected. Add callers by entering the 10-digit telephone number on the List tab or select contacts or extensions by click on the

corresponding tab and checking the box of any contact or extension that should be rejected. Click the OK button when complete.

Forward If Unavailable

Forward If Unavailable controls what happens to inbound calls when your phone is physically unplugged or otherwise not connected to Appia's system. By default, calls will go to voicemail when your phone is unavailable. To configure a different behavior, click on the Forward if Unavailable to enable the feature, and then click on the link to select a forwarding destination. Click OK when done.

Anonymous Calls

Click on the Anonymous Calls icon to enable Anonymous Call rejection on your line. When enabled, anonymous call rejection rejects calls from anyone calling anonymously. Anonymous callers will receive an announcement that you will not take their call.

Call Manager with Time of Day Routing

Call Manager with Time of Day Routing is an additional option that can be added to a normal Desktop User account. Please contact Appia if you wish to add this option. The Call Manager tab enables you to manage how incoming calls are routed to you. The Summary tab allows you to set basic inbound call settings.

Basic Settings

Basic settings can be configured on the Summary tab. To configure basic settings:

1. Configure an action for inbound calls. You can set one of the following actions:
 - **Ring my phone** – This will ring your Appia phone normally.
 - **Forward to** – This will forward all calls to another number without ringing your Appia phone. Enter the destination number exactly as you would dial it on your Appia phone.
 - **Send to voicemail** – All calls will go directly to voicemail without ringing your Appia phone.
2. **Configure No Answer** and **Busy** options for inbound calls if desired. If these options are not configured, inbound calls will go to voicemail if you do not answer or are already on the phone. Optionally, you can set one of the following options for inbound calls on no answer or busy:
 - **Forward to** – This will forward all calls to another number without ringing your Appia phone. Enter the destination number exactly as you would dial it on your Appia phone.
 - **Send to voicemail** – All calls will go directly to voicemail without ringing your Appia phone.

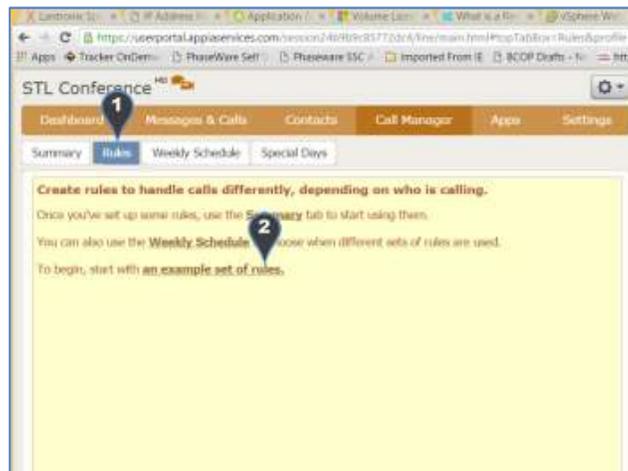


Advanced Settings

Advanced inbound call routing uses a combination of rules and / or schedule to provide granular control over inbound calls. Rules must be configured in order to enable advanced routing.

Creating Rules

1. Click on the Rules tab.
2. Click on the example set of rules link to start configuring inbound call rules.



Three example sets of rules are configured, explained below. Note that although the sets of rules have been created, no rulesets are put into effect without configuring them on the Summary tab.

1. **Normal** – Calls will ring your phone using the standard ringtone.
2. **Reject Calls** – All calls will be rejected.
3. **Screen Calls** – Anonymous callers will be prompted to record their name before your Appia phone rings and you will be able to listen to that recording accept or reject the call.

Rules are processed in order, from the top down. Inbound calls will use the first rule in a set that matches the circumstances of that call. So, specific rules are configured at the top of the list, with a

default rule at the bottom that will take effect if no other rules match. Rules can be moved up and down the Ruleset list by highlighting a rule and using the Move Up or Move Down buttons.

Rules within a ruleset consist of call criteria and actions. The available options are listed below.

Rule Criteria – Calls from:

- **An Individual Contact** – Select the contact from the dropdown menu. The rule will apply if an inbound call is from that Contact.
- **A Group of Contacts** – Select the group from the dropdown menu. The rule will apply if an inbound call is from anyone in that Contact Group.
- **Anyone on My Contact List** – The rule will apply if an inbound call is from anyone on your Contact List.
- **Anyone in My Business Group** - The rule will apply if an inbound call is from anyone in your Business Group.
- **This number or Group of Numbers** – Enter a single telephone number to have the rule match on that exact telephone number. To create a rule that matches a group of numbers, you can use patterns. For example, if calls from your office might come from any number starting "555 123 44..", you can use "?" in the places where you do not care what digit appears: "555 123 44??" matches every number from 555 123 4400 to 555 123 4499. You can also use a "*" on the end of a pattern to match any sequence of digits: 555* would match any incoming call from a number that begins with 555.
- **An Anonymous number** - The rule will apply if an inbound call is from an anonymous caller.



Rule Actions:

- **Ring My Phone** – Use the dropdown menu to select the standard ringtone or one of the distinctive ringtones.
- **Forward to** – Enter the forwarding number exactly as you would dial it from your Appia phone.
- **Send to Voicemail**

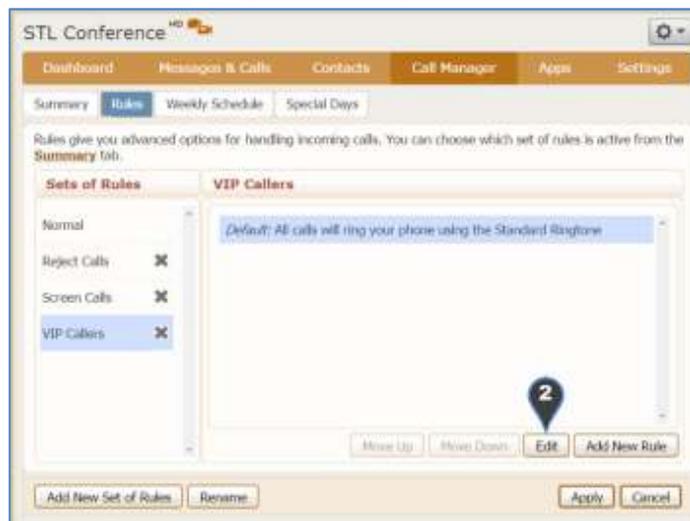
- **Reject the Call** – The caller will hear a recording explaining that you are not accepting his call.
- **Ask the Caller to Say Their Name Before I Accept the Call** – Call screening
- **Ring More than One Phone at the Same Time or in Sequence** – See the Find Me, Follow Me for TOD Routing Users section below for information on configuring this option.
- **Ask the Caller to Say Their Name before Ringing More Than One Phone at the Same Time or in Sequence** – Combines the call screening and Find Me, Follow Me actions above.



Example Ruleset 1 – Forward VIP callers to Cell, send other callers to Voicemail

Note: You must create a new Group on the Contacts tab named VIP before configuring this rule.

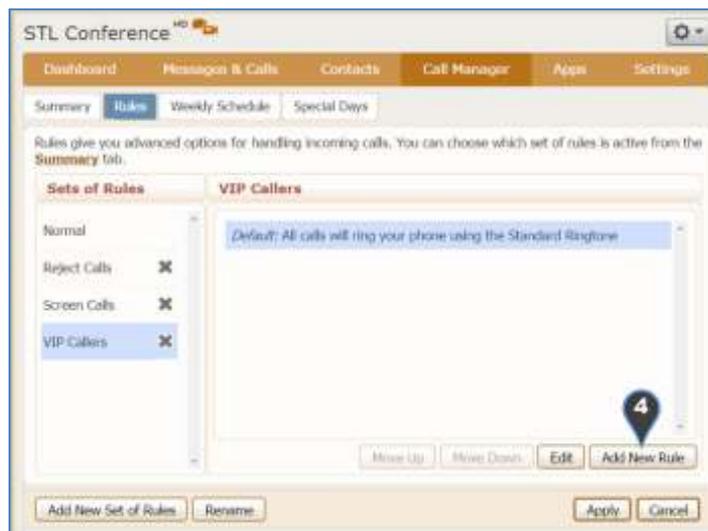
1. From the Rules tab, click the Add New Set of Rules. Enter a name for the new Ruleset, such as VIP Callers. Click the OK button.
2. A default rule has already been added to the new ruleset. The default rule is that all calls will ring your phone using the Standard Ringtone. Change this rule by clicking the Edit button.



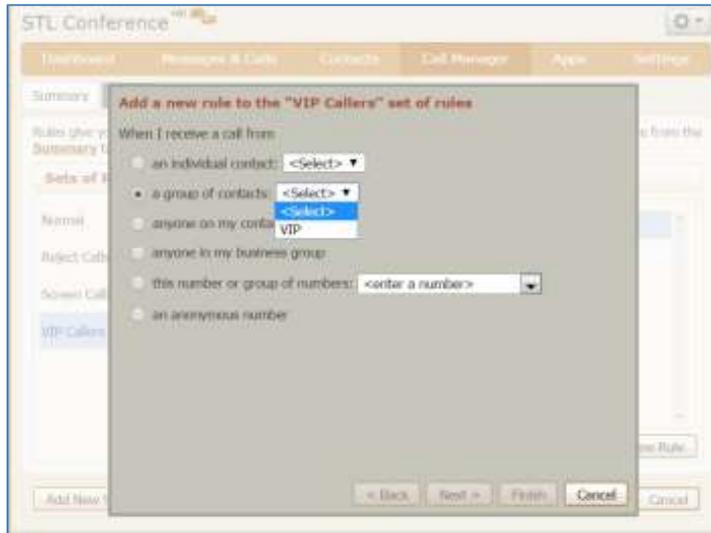
3. Select the Send to Voicemail action to modify the default rule to send all callers to voicemail. Click the Finish button to save the change.



4. Add a new rule by clicking on the Add New Rule button.



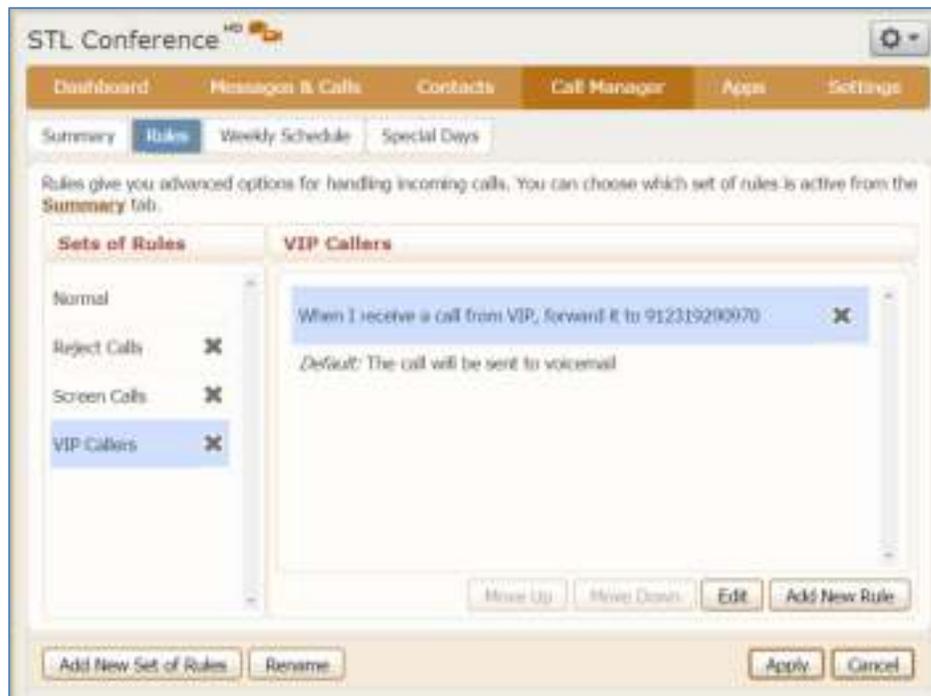
5. Select **A Group of Contacts** from the criteria list, then select the VIP group from the dropdown menu. Click the Next button.



6. Select **Forward To** and enter your cell phone number in the dialog box. You must enter your cell phone number exactly as you would dial it from your Appia phone. Click the Finish button.



7. The new rule has been configured successfully. Note that it is listed above the default rule, so inbound calls will be checked to see if the caller is in your VIP contact list first. If the caller is in the list, the call will be forwarded to your cell phone. If not, the caller will go to voicemail.

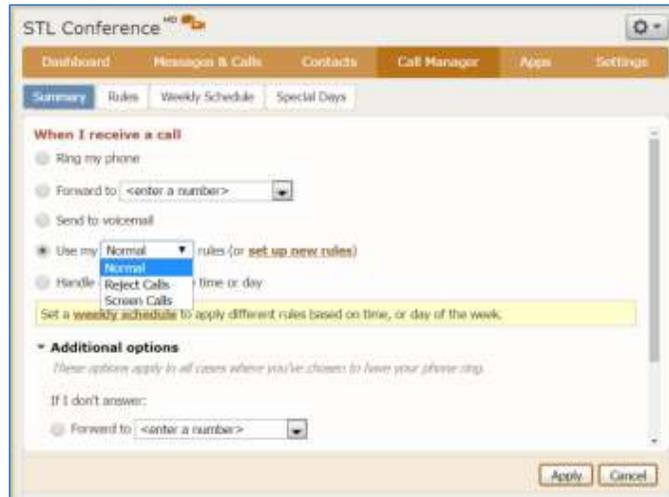


Example Ruleset 2 – Block Callers from a Specific Number

1. From the Rules tab, click the Add New Set of Rules. Enter a name for the new Ruleset, such as Block Nuisance Callers. Click the OK button.
2. A default rule has already been added to the new ruleset. The default rule is that all calls will ring your phone using the Standard Ringtone.
3. Add a new rule by clicking on the Add New Rule button.
4. Select **This Number or a Group of Numbers** from the criteria list, and then enter the telephone number as it shows up in caller ID. Click the Next button.
5. Select **Reject the Call**. Click the Finish button.
6. The new rule has been configured successfully. You can add additional nuisance numbers to the Ruleset by repeating the first five steps. Note that it is listed above the default rule, so inbound calls will be checked to see if the caller is calling from the number(s) you identified in the rules. If the caller is in the list, the call will be rejected. If not, the caller will ring your phone normally.

Applying Rules

Once rules have been configured, they must be applied to take effect. To enable a rule, navigate to the Summary tab, select the Use my (blank) rules, and select the Ruleset to use from the dropdown menu. Click the Apply button to save changes.

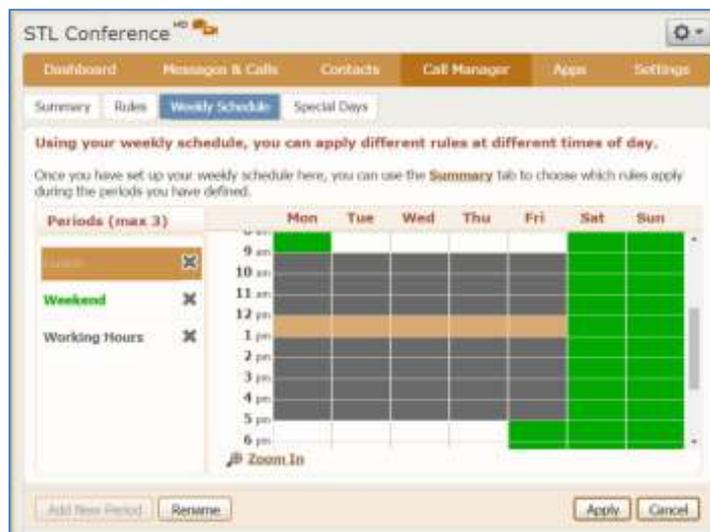


Time of Day Configuration

Time of Day routing allows you to configure different actions or rulesets based on schedule periods. You can configure up to three schedule periods, an 'All Other Times' period, and special days (like holidays) for time of day routing for user accounts.

Weekly Schedule Configuration

1. Click on the Weekly Schedule tab.
2. Click on the link **An Example Schedule That You Can Customize**.
3. Select the time period you wish to adjust from the list on the left hand side, and then click on the boxes in the schedule to set the desired hours. Clicking on a box in the schedule will toggle it between the time period you are adjusting and All Other Times. To change a box to a different time period, click on that time period from the list on the left hand side. If you require schedule configuration in 15 minute increments, click on the Zoom In link.



4. You can rename a time period by highlighting a time period and clicking on the Rename link. You can delete a time period by clicking on the X to the right of the time period name.

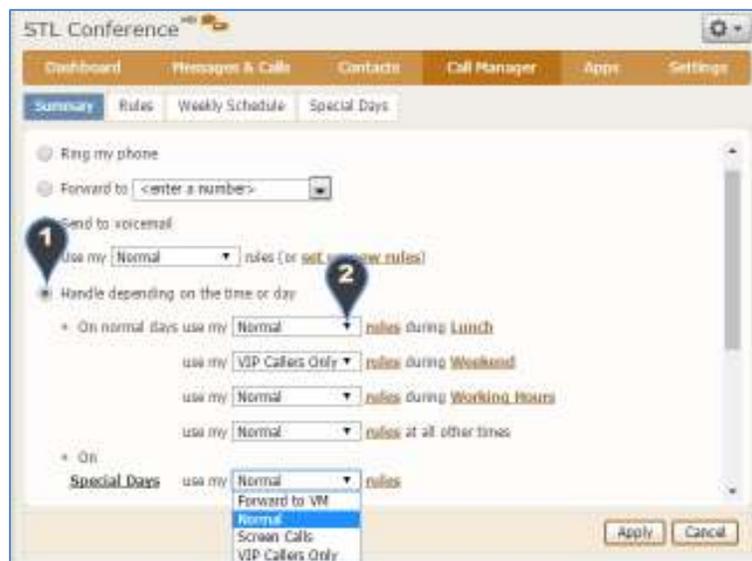
Special Days (Holidays) Configuration

1. Click on the Special Days tab.
2. From the Calendar view, click on a day to select it as a special day. Click it again to deselect.
3. Optionally, you can add all public holidays for the year by clicking on the Add Public Holidays button. For US Holidays, this will add the holidays listed below as Special Days to your calendar. Note that you can add public holidays, then deselect any holiday that you do not want treated as a Special Day on your Call Routing schedule.
 - New Year's Day
 - Martin Luther King Day
 - Presidents Day
 - Memorial Day
 - Independence Day
 - Labor Day
 - Columbus Day
 - Thanksgiving Day (Includes the day after Thanksgiving)
 - Christmas Day
4. Click the Apply button to save changes.

Enabling Time of Day Rules

After configuring rules, a weekly schedule, and any special days, Time of Day routing is enabled on the Summary tab of Call Manager.

1. Under **When I Receive a Call**, select the option **Handle Depending on the Time or Day**.
2. For each time period, select the Ruleset you want to use for inbound calls during that time period.
3. Click Apply to save changes.



Apps

The Apps tab provides download links for CommPortal Assistant and Accession if your account is entitled to use these applications. Click the View Apps button to install either of these applications. Contact your administrator or Appia Support for access to these applications if they are not shown on the Apps tab.



Settings

Account

To change your password and/or PIN, click on the security options on the Accounts tab. The Account Password is used to log in to the Appia User Portal and Accession and the Voicemail PIN is used to log in to your voicemail box through the telephone interface.



Messages

The Messages tab is used to configure Voicemail to Email, Mailbox Access, and Voicemail Greeting options.

Voicemail to Email

To configure Voicemail to Email, check the Forward Messages as Emails checkbox, then click the Add an Email Address link to specify the destination. Check the Leave Original in Inbox checkbox if you want the voice message to still appear in the User Portal and on your phone. Click the Apply button to save changes.



Mailbox Access

Mailbox Access consists of the following settings:

- **Skip PIN** – When checked, this option logs you directly into your mailbox without entering a PIN when you call from your phone.
- **Fast Login** – When checked, this option does not prompt you for your phone number when you call from your phone. This setting is enabled by default.
- **Auto-Play Voicemail** - If auto-play is enabled, then when you log into your mailbox, instead of hearing the main menu your messages will start playing immediately.
- **Voicemail Playback** – This setting allows you to determine whether you will hear the message plus message details (caller information, etc.,) just the message, or just the message details.

After configuring any of these options, click the Apply button to save changes.

Voicemail Greeting

Voicemail Greeting settings control what greeting is used when a caller reaches your voicemail. Greetings configured on this tab can be configured by clicking the Record or Edit links in the user Portal, or by calling in to your voicemail. Voicemail Greeting settings are:

- **Use the Greeting** – Allows you to choose what greeting to play to callers that do not meet exceptions configured below. Options are:
 - **Personal** – This is the main recorded greeting
 - **Extended Absence** – This is meant to be used as a vacation or out of office greeting
 - **System** - This option plays the normal system greeting, with no identifying information

- **System with Number** - This option plays the normal system greeting, including your phone number
- **System with Name** - This option plays the normal system greeting, but includes your recorded name
- **Use a Different Greeting when I'm on a Call** - Plays a different greeting when your phone is busy.
- **Use a Different Greeting outside Business Hours** – This option is only available for users that have added CommPortal Time of Day Routing to their account.
- **Use a Different Greeting within My Business Group** – This option will play a different greeting to other users in your company. Users outside the company will hear the greeting specified under the Use the Greeting option.



Account Codes

The Account Codes tab shows account code configuration added by your administrator. Account codes are optional authentication or authorization codes that may be required before dialing certain types of calls. Account Codes are disabled by default. Please contact your administrator for more information.

Notifications

The Notifications tab is used to control notification of messages via phone and email.

MWI

The MWI tab controls the message waiting indicator (Voicemail light) on your Appia phones. By default, your phone's MWI will be used to tell you if new voicemails are received. Please contact Appia support if you wish to make and changes to your MWI settings.

Email

The email tab controls email notification of new voicemails. Please note that this is notification only. To configure delivery of new voicemails via email, see the Messages tab within Services.

Email notification is configured by following the steps below:

1. Check the **Send email notification of incoming messages to the following addresses** checkbox.
2. Click the New Entry button and entering a valid Email address.
3. Select whether you want notification of all voicemails, or just urgent voicemails by checking the appropriate box.
4. Click Apply to save your changes.



Outdial

Outdial notification will call a predetermined telephone number to notify a user of new messages and will give the user an opportunity to log in and retrieve those new messages. To configure outdial notification:

1. Check the **Send outdial notification of incoming messages...** checkbox.
2. If you do not want outdial notification 24x7, configure a schedule. Schedule configuration is detailed below.
3. Enter the phone number that the system should call to notify of new messages. This must be entered the same way you would dial this number from your Appia phone.
4. Choose whether to use outdial notification for all voicemail, or just for messages marked urgent.
5. Configure how many times the system should try calling the number specified above after a new message is received and how long to wait between attempts. Select whether to stop trying after the notification call is answered or stop trying after the voicemail is accessed.
6. Click the Apply button to save changes.



To configure a schedule for outdial notification, click on the Schedule link as noted by the number 2 above. Click the Edit link, and then click on the boxes in the schedule to set the desired hours. If you require schedule configuration in 15 minute increments, click on the Zoom In link.



Override

The override tab allows you to configure a short term change to the notification schedule without having to make changes to your standard set of rules. Configuration is set just like on the Outdial tab, with the added ability to set an end date to the override rules.

Reminders

The Appia system allows you to configure basic reminder calls that will dial your Appia phone at a predetermined time. To record custom reminder messages, add CommPortal with Time of Day Routing to your line. To configure a basic reminder call:

1. Set whether the reminder will be a one-time reminder, whether it will occur once a week on a specific day, or daily.
2. Configure the time of the reminder call. Note that the time is listed in the same time zone as your Appia phone.
3. Click the Add button to add the reminder, then the Apply button to save.

You can click the X next to a reminder to delete it. Click the Apply button to save.

