CommPortal and CommPortal Assistant User Guide

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1   NOTICE

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1.1   CONTACT

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2   CommPortal Overview

CommPortal is an advanced web-based self-care interface which allows you to view and manage the configuration of your account.

2.1   Interface overview

CommPortal is the main web-based interface you will use to access your account using a PC. You can use it to listen to voicemails and to configure all the settings associated with your account.

You can log in to CommPortal by various means (described in section 2.3). After logging in, you see the following Dashboard tab.

Figure 1: CommPortal Dashboard

The CommPortal interface allows you to manage every aspect of your account. For example, not only can you listen to voicemails, you can record new messages using a microphone attached to your PC, initiate calls, and change the schedule that affects how your account deals with incoming calls and messages.

Each major account feature is represented on a different tab.   Click on each tab to bring up a new page of details, settings and options.

Any changes made using CommPortal are immediately reflected in your handset.   For example, if you delete any messages, they will no longer be available through the handset.

For full details of the contents of each tab, see chapters 3, 4, and 5.

2.2   Browser support

CommPortal is supported on the following browsers:

- Microsoft Internet Explorer versions 6, 7, and 8

- Firefox

It is supported on the following operating systems:

- Microsoft Windows 2000 (with the exception of CommPortal Assistant)

- Microsoft Windows XP

- Microsoft Windows Vista

CommPortal allows you to record new voicemails, greetings, and reminders and to add introductory messages to voicemails you are forwarding.   For these functions, Version 8 or later of the Adobe Flash plug-in is required.   CommPortal provides a link to a free download of the Flash plug-in from Adobe's website (which may require administrator privileges to install).

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 recording UI is opened.   However, CommPortal provides instructions to users to permanently enable access to the microphone.

2.3   Logging in to CommPortal

You log in to CommPortal in one of the following ways.

- You can use **http://comportal.syncglobal.net/portal** to navigate to the login page.   Enter your telephone number followed by your password/PIN.

  - You will be locked out of your CommPortal account for one hour if you enter an incorrect password or PIN five times in succession.   This restriction protects against malicious use.   SyncGlobal can unlock an account that has been blocked in this way.

- You can install CommPortal Assistant (described in Appendix A), which will log into your CommPortal every time you log into your local network.

3   CommPortal Features

This chapter details the features that are available to individual subscribers using CommPortal.

3.1   CommPortal common items

The CommPortal UI has several buttons on it that are present whichever screen you are on. In a standard customization, these common items are found in the top right corner of the interface. You may not see all these buttons, depending on your available features.

Figure 2: CommPortal common items

- – Click-to-Dial and – remote Click-to-Dial.

  These buttons initiate a Click-to-Dial call or a remote Click-to-Dial call respectively. This feature is described in more detail in section 3.1.1.

- - Logout

  Use this button to log out of your current CommPortal session.

- - Refresh

  Pressing this button will refresh the details shown on the current page.   For example, when you are looking at your messages, this will check whether there are any new ones.

- - Help

  Pressing this button brings up the help information for the current screen.

3.1.1 Click-to-Dial buttons

If the Class of Service permits it, Click-to-Dial allows you to initiate calls using CommPortal (or CommPortal Assistant).

You can start a call by clicking on any number in the Contacts or Missed Call lists.

Alternately, you can use the Click-to-Dial or remote Click-to-Dial icons, or respectively, to launch the Click-to-Dial overlay.

Figure 3: Click-to-Dial overlay

You manually enter the number you want to call either by selecting an entry from a dropdown list of your contacts or using the keypad.

- When expanded, the drop-down list displays the name and directory number of up to 20 of your contacts. For Business Group lines, the list also displays extension numbers along with their names.   The dropdown list has an auto-suggestion mechanism which filters the contacts (and extensions) as you enter digits/letters.

- You can use your keyboard to enter letters as well as numbers to facilitate the calling of vanity numbers, for example 1-800-FLOWERS.

- You can use the

   button to clear the number you have entered

   button to initiate the call

   button to end the call

Once the number has been entered and the call initiated, Click-to-Dial then calls you and, when you answer your phone, goes on to make the outgoing call.

A pop-up displays the status of the Click-to-Dial call and includes buttons to end the call, or simply close the pop-up (to continue using CommPortal for instance).   This is particularly helpful if you inadvertently started a Click-to-Dial call as you'd otherwise have to pick up and hang up your phone.   It also allows you to cancel the call if you are unable to reach the phone with which you chose to make the call or if the call gets caught between two voicemail systems.

The pop-up is dismissed automatically after a preconfigured timeout (default: 15 seconds). Once the pop-up has gone, you can still end the call by hanging up as normal.

3.1.1a Click-to-Dial options

Depending on the Class of Service, you can make changes to the behavior of your Click-to-Dial service.

Remote Click-to-Dial

By default Click-to-Dial calls your primary telephone; with **remote Click-to-Dial** you can configure another phone to use for the call instead.

You can pre-configure in CommPortal a phone number you want to use for Click-to-Dial calls.   This phone is then used whenever you initiate a Click-to-Dial call.   You can also reach this configuration page in CommPortal from the *Configure* button on the Click-to-Dial pop-up itself, allowing you to dictate which phone you want to use when making a Click-to-Dial call.

Auto-Answer

By default Click-to-Dial waits until you pick up your phone before dialing the contact number.   You can configure whether or not the Click-to-Dial service dials the contact number immediately without waiting.

3.2   Dashboard tab

The Dashboard, shown in Figure 4, is the initial screen that most subscribers see when they first log in to CommPortal.

The Dashboard provides a quick view of the most common CommPortal functions at a glance. For example, you will see the following:

- A count of voicemail and fax messages in your mailbox, with an indication of how many are new

- Your contact list, for quick access to names and telephone numbers

- A list of missed calls

- A summary of the current settings for frequently-used call services

Figure 4: CommPortal Dashboard

Each of these functions is displayed in its own area of the screen, and you can click on the links for more details or to modify the settings.   You may find you can access all the functions required for everyday use simply by using the information and links displayed on the Dashboard.

The tabs across the top of the Dashboard provide access to more detailed information and settings, as described in the following sections in this chapter.   This banner will be scrollable, depending on the class of service.   Each scroll button will be grayed out when the user has scrolled as far as possible in a given direction.

3.2.1 New Messages

The Dashboard provides an instant check of whether there are any new (unheard) voicemail or fax messages for you.   It also displays the total number of voice and fax messages currently held in your mailbox.   A single click on either the voicemail or fax link takes you to the Messages and Calls display, described in section 3.4, for access to all these messages.

3.2.2 Missed Calls

The Dashboard shows a list of the most recent missed (unanswered) calls to your phone.

- If the missed caller's number matches an entry in the contact list, the caller is shown by name, with an image showing whether the matched number is the caller's home, office or mobile number.   Clicking on this name takes you to the appropriate entry in the contact list.

- If the caller has Calling Name Delivery (CNAM) enabled and CommPortal can successful determine this on the incoming call, the caller's name will be displayed.

- If there is no match from the contact list and the call cannot be determined using Caller Name information, the caller's number is shown.

- If the caller has withheld their identity, the caller's name/number will be displayed as `unknown`.

- The entry also shows the date and time of the call.

You can click on the number and choose to return the call or add it to your contact list. The Click-to-Dial feature is described in more detail in section 3.1.1.

3.2.3 Contacts

The Dashboard provides quick access to your Contact List – the address book of known callers' names and telephone numbers.   For each contact, the display shows the contact's name, organization name, and up to three different telephone numbers (home, office and mobile).

You can add or edit entries in this list using the Contacts tab, described in section 3.5. Thanks to Click-to-Dial, you can click on the contact to make a call.   The Click-to-Dial feature is described in more detail in section 3.1.1.

3.2.4 Settings

The Dashboard shows a summary of the settings for some important call services.   The information displayed in this panel will depend on your class of service.

Clicking on the name of a service in this list moves to the **Call Manager** tab, described in section 3.6, allowing you to change the settings.

3.3   My Mobile tab

The **My Mobile** tab is used to associate a mobile phone from another service provider with your SyncGlobal account.   Once you have done this, you can

- access your CommPortal Voicemail account from your mobile handset

- configure your mobile phone to use your existing CommPortal voicemail account, thereby replacing your mobile voicemail and providing you with a single shared inbox

- configure CommPortal to send a text message to a mobile handset every time a new message arrives in your account.

This mobile phone number must be registered in the same country as the associated landline.

On first accessing the *My Mobile* tab, you are prompted to enter your mobile phone number to configure this service.   CommPortal will then display the screen shown in Figure 5.

Figure 5: CommPortal My Mobile tab
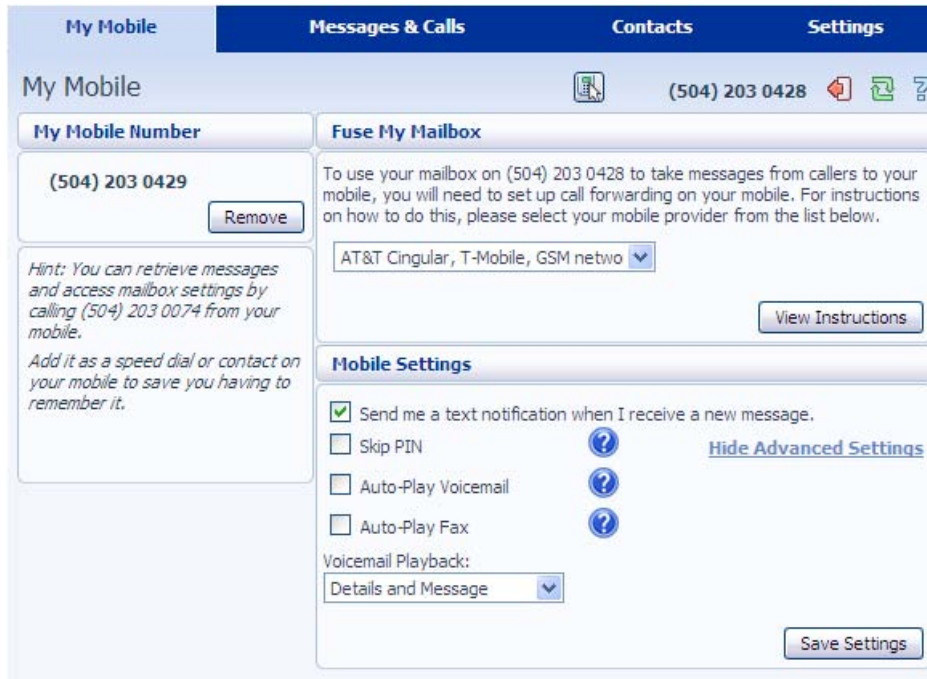
- The *My Mobile Number* panel allows you to remove your mobile phone number from the Delivery Center, either because you no longer want to use the service, or because you need to enter a different mobile number.

- The *Fuse My Mailbox* panel allows you to configure your mobile phone to redirect callers to your SyncGlobal voicemail account rather than your mobile phone provider voicemail.

  You select the appropriate service provider for your mobile phone from the drop-down list, and then press *View Instructions*. This will display an overlay with instructions tailored to activating, and subsequently deactivating, this service for the specified service provider on your mobile phone.

  The final option in this drop-down list, Other, displays general guidance for the configuration changes needed to configure a mobile phone for use.

  The default CommPortal UI includes configuration instructions for the most prominent mobile phone service providers in North America.

- The *Mobile Settings* panel allows you to modify the configuration of the integrated voicemail service.   You can

  - choose to receive a plain-text SMS message on your mobile phone every time a new message arrives in your account.

  - expand the *Show Advanced Settings* link to change the default behavior when dialing in to retrieve your voicemail.   Clicking on the question mark alongside each setting will reveal more details about that setting. You can choose whether

    - you have to enter your PIN (the default setting is unchecked to indicate that a PIN is required when you are calling from your mobile)

    - voicemail and fax information is automatically played (the default setting is unchecked, so that you has to navigate the TUI to start playing your messages)

- you hear the message, the detail from the message header, or both, using the drop-down selector (the default setting is *Details and Message*).

Once you have made the required changes, you should press *Save Settings* to apply them.

3.4 Messages and Calls tab

The Messages and Calls tab provides access to:

- voicemail and fax messages

- lists of calls made, received and missed.

3.4.1 Messages

Figure 6 shows the Messages tab.

Figure 6: CommPortal Messages & Calls display
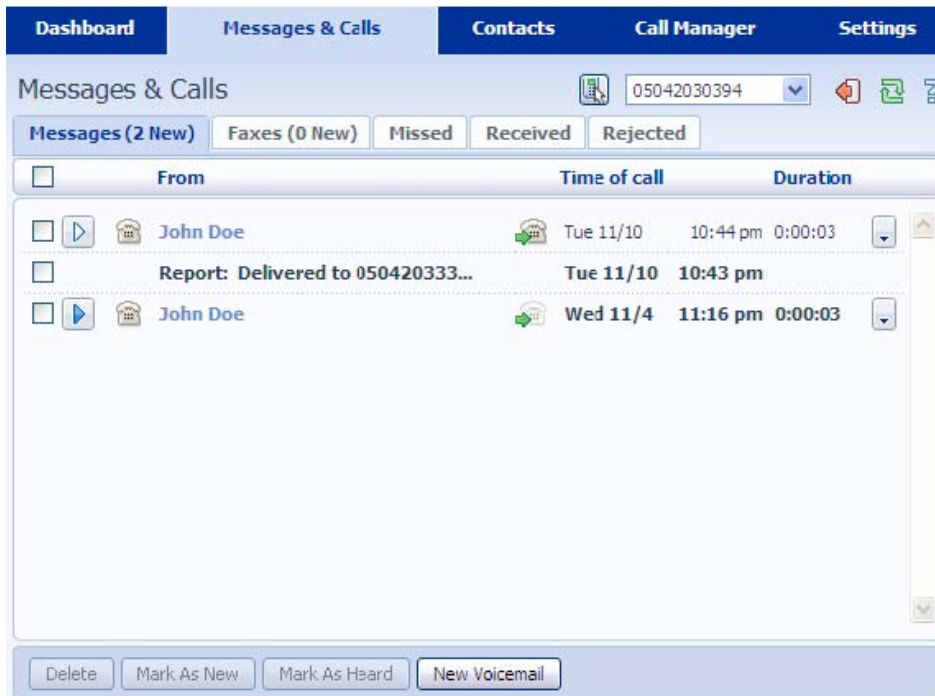
All of your voicemail messages are displayed in a list within the CommPortal UI. Additionally, any system messages (for example Delivery reports, Read reports and indications that you have missed a reminder) are also displayed in this list.   Using this display, you can:

- listen to a specific voicemail by clicking on the entry in the list – with no need to listen to all messages to find the relevant one, as you would in a telephone user interface

- use the Voicemail Player to play voicemail messages, as described below

- see whether
  - a message has already been heard
  - a message has been marked urgent (🔲), or private (🔑)
  - the sender called from his/her landline or wireless device
  - the sender requested a read receipt
- mark a message as heard or new
- delete messages when they are no longer needed
- save messages to your own computer
- left-click on the icon on the right hand side of the message to:
  - add the sender to the Contact List
  - record and send a voicemail message to another subscriber in reply to a selected message
  - forward a selected voicemail to another subscriber, with the option to record an introductory message
  - forward a selected voicemail as an email attachment, to one or more email addresses, and with the option to mark the email urgent or private.

Messages marked with the private icon cannot be forwarded to another recipient.

3.4.1a Message Quotas

The icon appears in the top right hand corner when your mailbox has exceeded 90% of its quota for faxes and voicemail messages.   These quota limits are defined by the Classes of Service for you.

You can click on this icon to see a pop-up that shows the current status of your mailbox.

- If your mailbox is nearly full, the pop-up shows how much of the mailbox's quota is being used.   This may refer to the number of messages or the total quantity of data, depending on the cause of the quota excess. It also shows what the quota limits are for the account

- If the user has actually met this quota limit, the pop-up displays the message `Your inbox is full` and gives details of how the quota has been used up, along with the quota limits that apply to this mailbox.   You then have to delete old messages in order to receive new ones.

3.4.1b The Voicemail Player

You can click on the icon alongside any of your messages to launch the Voicemail Player.
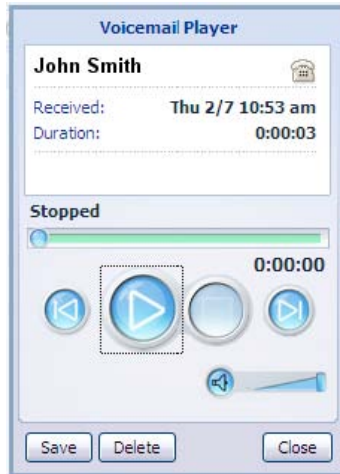
Figure 7: Voicemail Player   *Figure 8: Reply to Voicemail*

Information about the selected message will be displayed, and you can then listen to the message by clicking on the Play button and adjust the volume of the playback using the slider.

You can click on the [icon] or [icon] icons to move to the previous or next message in your mailbox, without having to return to the Messages and Calls screen.

3.4.1c Voicemail Reply and Voicemail Composer pop-ups

The Reply to Voicemail pop-up illustrated below appears when you click on the [icon] icon alongside a voicemail message and select the Reply menu option.

You can use this to:

- record a reply to this voicemail

- send it to one or more subscribers

- optionally mark the message urgent and/or private

- listen to the original voicemail and the reply once you have recorded it.

The telephone number of the original sender will automatically be filled in when the pop-up opens, but you can change this or add other recipients.   Multiple recipients should be entered with ";" separators.

The *To* field uses an auto-complete function, which provides a list of suggestions with phone numbers retrieved from your Contacts list.   Alternatively, clicking on the downward arrow alongside this field displays your entire Contact List, from which you can select one or more recipients.

Alternatively, if you want to record a completely new voicemail, you should select the *New Voicemail* button at the foot of the screen to launch the Voicemail Composer pop-up.   This UI enables you to record a new voicemail and is very similar to the Reply to Voicemail pop-up shown.
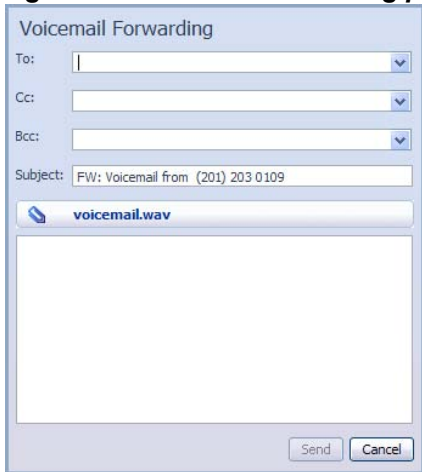
3.4.1d Forwarding voicemails as emails

The Voicemail Forwarding pop-up appears when you select the Forward as Email menu option after clicking the ⊡ icon alongside a selected voicemail

Figure 9: Voicemail Forwarding pop-up

- You can type in the required email address(es) in the To, Cc and Bcc fields, separated by a semicolon (";") if there is more than one recipient.

- Alternatively, you can enter some text in these fields – for example the first name of the recipient – to display a list of possible matches from the Contacts List that can then be selected and automatically added.   Clicking on the downward arrow alongside these fields displays your entire Contact List, from which you can select one or more recipients.

- The source email address is always set to an email address containing your telephone number.   This cannot be changed using CommPortal, and so is not displayed. The Reply-To address is always set to a "no-reply" address at SyncGlobal's domain.

- The Subject field defaults to that shown above, but you can edit this if you wish.

- A voicemail is always forwarded by email as a `.wav` attachment.

- You can type a message for the recipient(s) in the email body.

3.4.1e Forwarding voicemails as voicemails

The Forward as Voicemail pop-up appears when you select the Forward as voicemail menu option after clicking the ⊡ icon alongside a selected voicemail.

- As with the other forwarding options, you can select one or more recipients and mark the message urgent or private.

- You can also record an introduction that will be played before the original voicemail or listen again to the original voicemail.

3.4.2 Faxes

Figure 10 shows the Faxes tab, which appears only if you have a Unified Messaging account.

Depending on your Class of Service setting, you will either view faxes in PDF or TIFF format.

Figure 10: Fax display
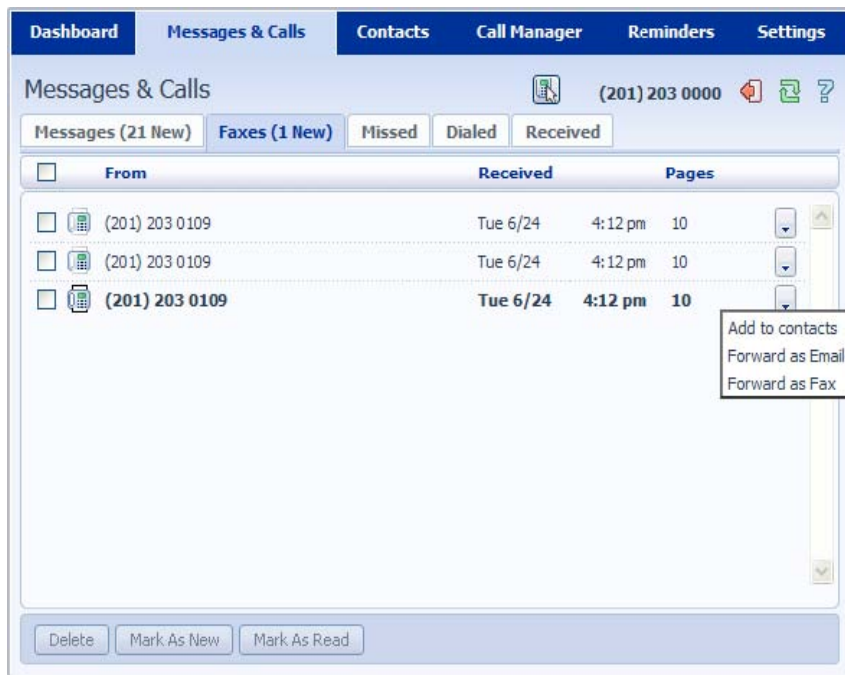
Using this display, you can:

- click on the fax icon to read a fax message on your own PC, either as a PDF or in TIFF format using a TIFF viewer (for example Windows Picture and Fax Viewer)

- right-click on the fax icon to download and save the fax to your PC, again in either PDF or TIFF format

- see whether a fax has already been read

- mark a fax as new or read

- delete faxes when they are no longer required

- left-click on the ⊡ icon on the right hand side of the message to:
  - add the sender to the Contact List
  - forward a selected fax to another subscriber's fax machine
  - forward a selected fax to one or more subscribers as an email attachment and mark the email urgent or private, as described in section 3.4.1d.

3.4.2a Forwarding faxes as emails

The *Fax Forwarding* pop-up appears when you select the Forward as email menu option after clicking the ⌐icon alongside a fax. This pop-up behaves in exactly the same way as the Voicemail Forwarding pop-up described above, with the fax being forwarded either as a `.pdf` or `.tif` attachment, depending on the format set by your Class of Service.

3.4.2b Forwarding faxes as faxes

The Fax Forwarding as Fax pop-up appears when you select the Forward as fax menu option, after clicking the ⌐icon alongside a fax. Using this pop-up, you can send the fax to another subscriber.

Using the pop-up, you can:
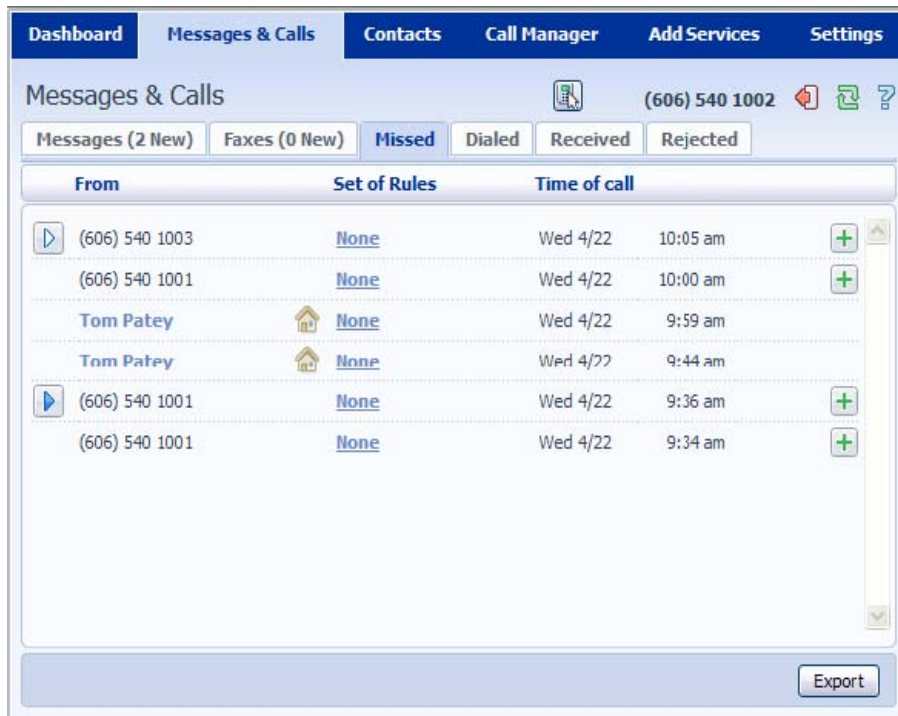
- select one or more recipients, *provided these recipients are also SyncGlobal subscribers*

- mark the fax as urgent

- view the original fax

3.4.3 Call lists

Call lists record activity on your telephone line. Whenever you make a call, receive a call, or miss a call, the details of the call are recorded and displayed in the CommPortal UI.

Figure 11 shows the Missed Calls display.   The Dialed Calls and Received Calls displays are similar, but also include the duration of each call.

Figure 11: Missed Calls display

The set of calls displayed in these tabs depends on the services you have.

- If you have Incoming Call Manager service, there will be a fourth tab displaying any Rejected Calls – a list of calls that were rejected on the basis of the rules you configured.   You can also view the rules used to route an incoming call (whether Missed, Received or Rejected) and then access and change your rules for this particular telephone number or device.

Each of the tabs offers similar features.

- The caller's name is shown if it can be determined from the contact list, described in section 3.5, or if the caller has Calling Name Delivery (CNAM) enabled. Otherwise, the caller's number is shown.   If the caller has withheld their identity, the caller will be shown as unknown. If a caller was identified from your contact list, an icon to the left of the name will indicate whether the call was made from the caller's landline, fax or wireless device.   If the device called cannot be determined, the unknown device icon ( ) is shown.

- The icons to the right of the caller's name –   and – are used to indicate whether the call was made to your landline or wireless device. These icons will only be present if you have more than one device configured, and the called number can be determined.

- Clicking on an entry in these lists gives you the choice to create a new contact list entry for this caller, with the telephone number and, where available, the first and last name already filled in.   You can then add further details for this caller.

- Clicking on the *Export* button will open a pop-up that downloads the call lists to your PC.   You can opt to export any or all of Received, Dialed, Rejected, or Missed calls (provided each Call List is available to you).

  The exported data is a comma separated variable file, with default filename calllistdata.csv, that contains call list information for each call type selected. This file format can be exported into Microsoft Excel or many other third-party applications.

3.5 Contacts tab

Contact lists allow you to associate the name and details of a caller with one or more telephone numbers (such as home, office and cell phone numbers).   You can also record postal and email addresses for your contacts and can have a total of up to 1000 contacts in your account.

The interface includes a powerful search facility, allowing you to look up a contact by name, organization name, telephone number or address.

Figure 12: CommPortal Contact List display
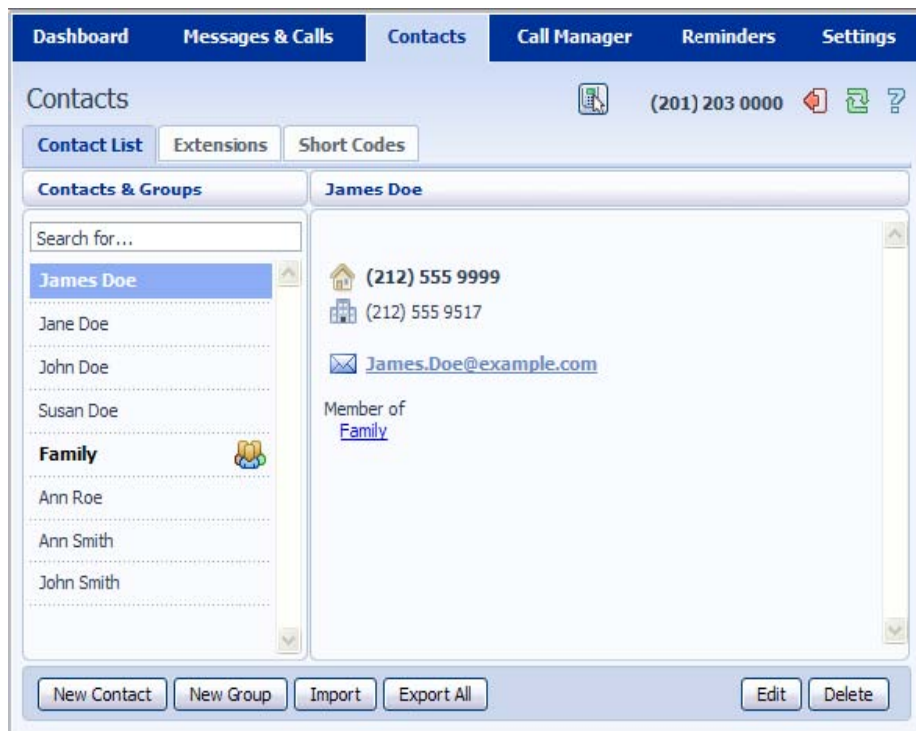
As well as being useful simply as a way of storing and retrieving contact details, Contact Lists enhance other services within CommPortal.

- The Messages and Calls tab makes use of the contact list to display the names of callers or of people that you have called, rather than just their telephone numbers.

- The **auto-complete** function provides a list of suggestions retrieved from the contact list when you enter data in a To, Cc or Bcc field while sending messages to other subscribers.

- Services such as Call Manager allow you to specify accepted callers by selecting them from the contact list, without having to type in your numbers.

3.5.1 Synchronization with Outlook Contacts using CommPortal Assistant

CommPortal Contact Lists can be integrated with your Outlook 2003 and 2007 contacts. If you have downloaded CommPortal Assistant (CPA), as described in section 3.7.2, and have an Outlook profile, you can configure CPA to automatically synchronize any changes made to a contact in CommPortal with the corresponding entry in Outlook and vice versa.

This synchronization can be used alongside the Import and Export method described below, without any unwanted duplication occurring.

3.5.2 Import and export

Your you can download your contacts to a comma separated value file, for use outside CommPortal, by pressing the *Export All* button. You can select the format of CSV file you want to create from *Outlook/Outlook Express compatible*, *Windows Contact on Vista* and *Native Format*.

You can also upload a file containing contacts into CommPortal.

- If you already have contacts in CommPortal, you can select whether matched entries will be ignored, duplicated or overwritten.

- Before the import starts, the system checks the file is suitable for upload.   The file must use the Windows comma separated variable format (CSV) and contain a suitable header line that describes the column contents for each contact. A maximum of 1000 contacts can be included in this file.   However, since you can only have a maximum of 1000 contacts, you should also ensure that the import file and choice of import method will not cause the total number of contacts in your account to exceed 1000.

- During the import procedure, the system checks each contact in turn and rejects invalid entries. The import progress dialog also has a *Details* button that shows the result for each contact in the file.   It shows whether the contact was added, ignored or updated as applicable.

3.5.3 Contact Groups

You can also use your Contact Lists to set up groups of contacts by clicking on the New Group button at the foot of the Contact Lists screen.

- You are then prompted to give the new Group a name and a two-digit numeric telephone ID for use within the TUI.

- All the entries on your Contact List will also be displayed, and you can use the checkboxes to select the people or Groups who should be members of this Group.

- Contacts can be members of more than one Group, and a Group can also be a member of another Group.

Groups are shown in bold type in the Contacts list, identified by the icon. The details and membership of your Groups can subsequently be edited or deleted by clicking on the Group entry in the Contact List.

When using the TUI, you can select these Contact Groups to conveniently address a single message to several subscribers.   You can also use these Groups when setting up rules for call handling using Incoming Call Manager.

3.6   Call Manager tab

The **Call Manager** tab allows you to manage how incoming calls are handled. It provides a single management interface for all the incoming calls services to which you are a subscriber, so that you can easily see which services are active and how they interact.

There are two different types of Call Manager services.   Both types of service, described below, are accessed under the Call Manager tab.   However, a subscriber will only have access to one particular service, so you will see either the Follow Me service or the Incoming Call Manager service – not both.

3.6.1 Call Manager

The tabs displayed on the Call Manager screen will vary according to which services you subscribe.

Figure 13: CommPortal Call Manager display
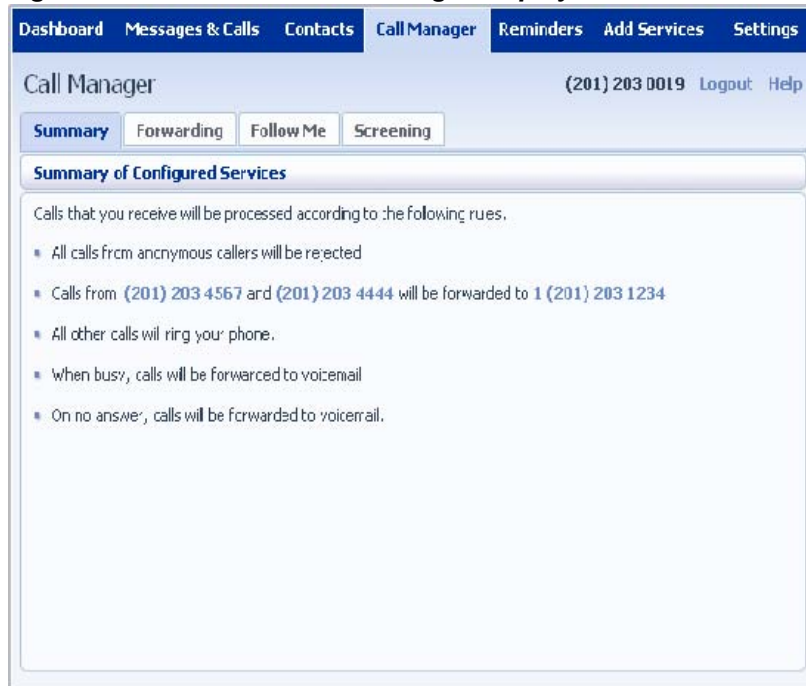
The **Summary** tab provides a narrative description of how your incoming calls will be handled, according to the services that are currently enabled. This allows you to check at a glance how the services combine and interact and to verify that the settings are correct.

The other tabs each provide control of a particular service or group of services.   The set of tabs displayed depends on which services you subscribe.   After using one of these tabs to change the settings for a service, you can return to the **Summary** tab to check how the updated services interact.

3.6.2 Follow Me Service

The **Follow Me** service allows you to set up rules so that a defined sequence of additional telephone numbers is rung when you receive an incoming call but do not answer your primary line.

The Follow Me tab allows you to enable or disable the Follow Me service

Figure 15 shows the Follow Me tab, where you can set up rules for the Follow Me service and turn the service on and off.

Figure 15: Follow Me service
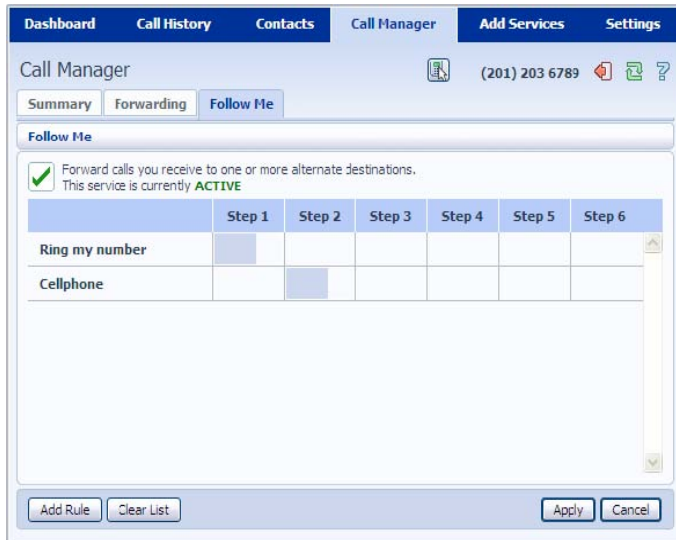
Clicking on an existing entry in the list or the Add Rule button at the bottom of the screen brings up a dialog box that allows you to specify:

- the number to ring. This can be selected from your "Forwarding Destinations." Otherwise, the phone number must be entered manually.

- the ring duration.

- the step when this rule should be applied.

As with many of the CommPortal screens described in the remainder of this chapter, your must press Apply for any changes to take effect. Your will see a warning message if you navigate away from the screen without doing this.

3.6.3 Incoming Call Manager

Incoming Call Manager offers an integrated call handling service, with a powerful set of configurable rules.   The following tabs allow you to configure sets of rules and set schedules for when specific rules should apply to incoming calls.

Figure 16: Incoming Call Manager display

The **Summary** tab allows you to view and configure your call-handling options. For example, you may wish your phone to ring as normal or divert all calls directly to voicemail, or apply some of your call handling rules depending on the time of day.

Only the first three radio buttons shown in Figure 16 are displayed if you have not yet configured any call handling rules, for example when you initially access the Call Manager Summary tab.   You will see an introductory message explaining how Call Manager rules work and prompting you to click on a link that takes you to the Rules tab so that you can configure these.

Once you have configured at least one Rule, all five radio buttons will be displayed on the Summary tab.   If you have not yet set up a weekly schedule, you will see a message prompting you to do so by clicking on a link that takes you to the Weekly Schedule tab. The schedule-specific sub-settings shown on Figure 16 will be hidden unless the *Handle the call depending on the day or time* radio button is selected.

You can use the **Rules** tab to configure more advanced Sets of Rules for your incoming calls.   For example, you might want to forward calls from family and friends to a home phone while forwarding calls from the office directly to voicemail and screening calls from a particular number.

You can then use the **Weekly Schedule** tab to specify where you will be at certain times of the day.   Using the options on the **Summary** screen, you can then apply different Sets of Rules at different times of the day or week.   Figure 17 shows the Weekly Schedule covering your lunch break.

Figure 17: Incoming Call Manager Weekly Schedule display
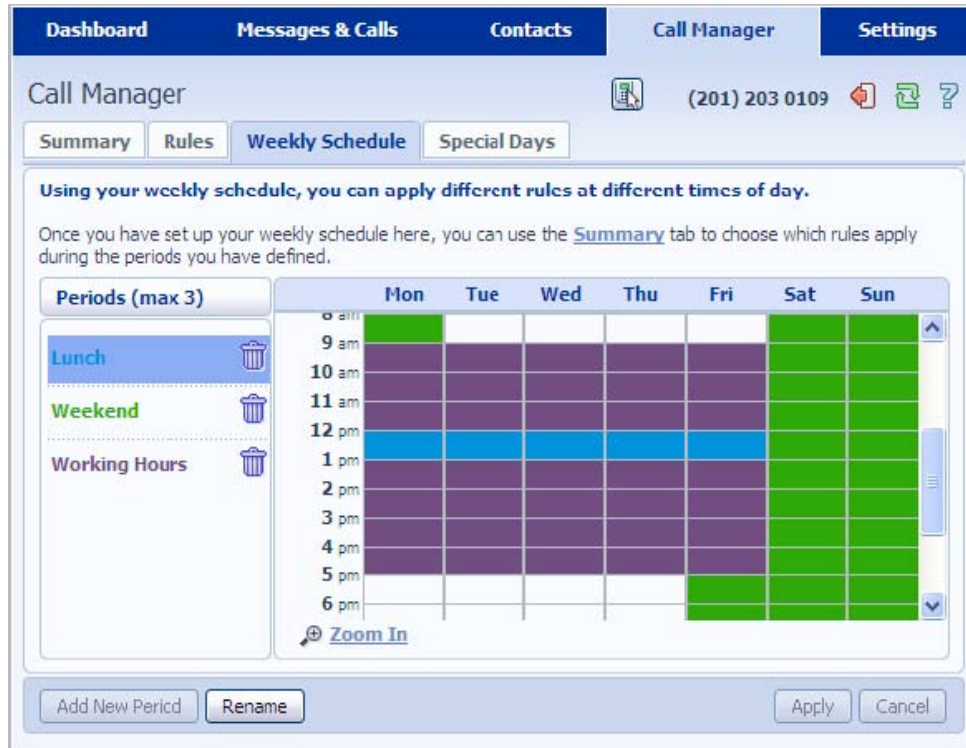
The **Special Days** tab allows you to set dates that are exceptions to your normal weekly schedule, for example vacations or business trips. This screen includes the option to add the public holidays for your region automatically at the click of a button.

3.7 Settings tab

The **Settings** tab provides access to various pages, giving details of Call Service settings that you're unlikely to change regularly. These include, for example, security options (password and PIN), forwarding preferences and messaging options.

The options available under the Settings tab will vary depending on the services available to you.
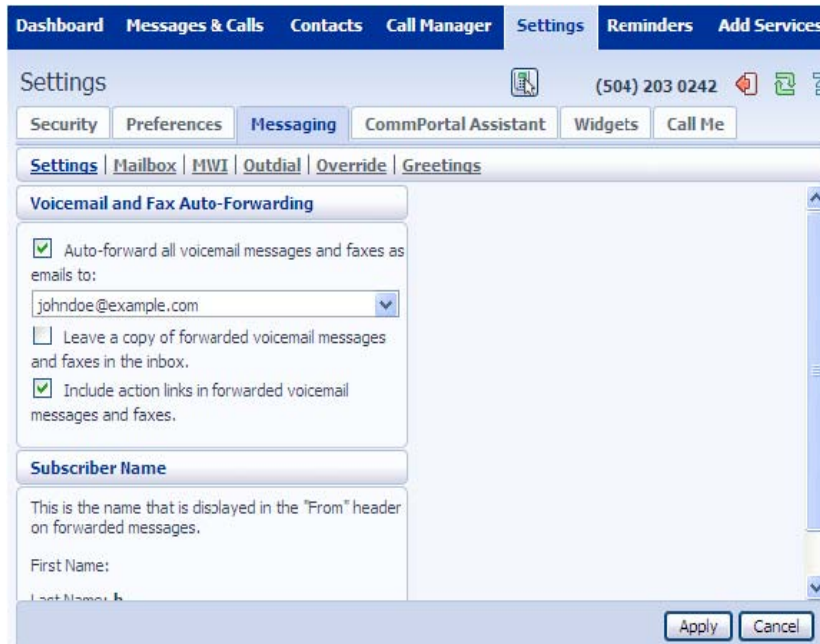
3.7.1 Messaging

You can use the various tabs below the **Messaging** page to access the settings for these messages.

3.7.1a Settings tab

The Settings tab, shown below, allows you to change the general settings for your account.

Figure 21: Messaging Settings

You can use the **Settings** tab to change a number of options.

- You can configure auto-forward for all voicemail messages and faxes to up to five specified email addresses (the permitted number depends on your Class of Service) by

  - marking the checkbox to turn on the feature

  - supplying one or more email addresses, with multiple addresses separated by semi-colons

    If you have email addresses in your Contacts list, you can use the drop-down selector icon on the right to bring up a list of email addresses filtered on the currently-entered email address.   The drop-down icon is hidden if no contacts in your contact list have email addresses.   When the message is forwarded to multiple recipients, the email sent to one recipient does not include details of any of the other recipients.

    The ability to add more than one email address is controlled by a Class of Service option.   When attempting to add more than your permitted number of email addresses, you will see an error message.

    Faxes are forwarded either in PDF or TIFF format, depending on how you view faxes.

  - choosing whether to leave a copy or delete any forwarded messages

- You cannot edit your name.   The Business Group Administrator must change it for you.

3.7.1b Mailbox tab

You can use the **Mailbox** tab to configure mailbox settings, including:

- enabling or disabling fast login

- selecting voicemail playback options: details and message, details only or message only

3.7.1c Greetings tab

You can use the **Greetings** tab to:

- select your default greeting

- specify when alternative greetings should be used and the behavior when a greeting expires

- use the Greeting Recorder to record your spoken name and other voicemail greetings selected from a dropdown box, for example greetings to be used out-of-hours or during an extended absence.

3.7.1d Notifications

You can set options for how you wish to receive notifications whenever a new message arrives for you.   The bar under **Messaging** shows the tabs for the different notification options available to that subscriber, for example **MWI** (**Message Waiting Indicator)**, **Email**, **Outdial** and **Pager Notifications**.

As an example, the screenshot below shows the display that you can use to set up Outdial Notifications.   This type of notification allows you to configure a telephone number that the system should call whenever a new message arrives in your account.

Figure 22: Outdial Notifications

The Message Waiting Indicator and Email Notifications displays are similar, though MWI targets are restricted to other telephone numbers in your business group. The Pager Notifications display is described separately below.
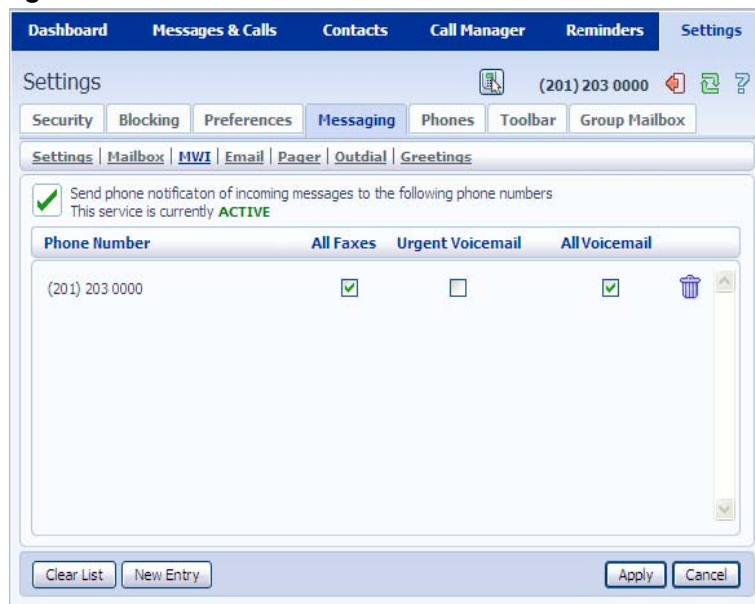
You can:

- enable or disable the notification type by clicking the box on the left-hand side of the screen.   A green tick in this box indicates that this notification type is enabled, an empty box indicates that it is currently disabled – this will be confirmed by the screen message stating whether the service is currently Active or Inactive

- choose which events – Urgent Voicemails, All Voicemails and/or All Faxes – will trigger a notification to a particular target

- enter or modify targets for notification types.

For Outdial notifications, you can additionally:

- configure a schedule containing periods when outdial notifications are sent – during inactive periods (for example overnight) any unheard message still activate the MWI, but the outdial notification is postponed until the next active period in the schedule

- control the delay between receiving a message and sending out a notification

- control how many times, and at what interval, the system re-tries the call if the notification is not acknowledged

- control what you have to do to acknowledge the notification: simply answer the outdial call, or proceed to access your voicemail.   Using the latter setting prevents a notification being lost because the call was picked up by an answering machine or another member of the household.

The following screen illustrates further options available to you when configuring notification types that allow more than one target.

Figure 23: MWI Notifications

For these notification types, you can:

- use the trash can icon to delete a target from the list

- use the checkboxes to change the message types that trigger notifications

- delete the whole list by selecting the **Clear List** option

- add a **New Entry** to the list – selecting this option will create a pop-up box in which to enter the information for the new target.   This option will be grayed out if you have already configured the permitted number of targets.

Pager notifications

You can configure up to two pagers that will be used to receive new message notifications.   These notifications can be sent to any of outdial, numeric, and alphanumeric email pager types.

When you select the **Pager** tab, CommPortal displays a summary of any entries that have already been configured – including pager type, pager email address or pager provider, pager number, callback number and types of message that cause the notification to be sent.

Selecting an entry from the list displays its details in the Edit Pager Entry popup dialog, and allows you to specify the behavior and set the schedule that should be used for this type of notification.   Your will also see a similar page if you click on *New Entry* to set up a new pager.
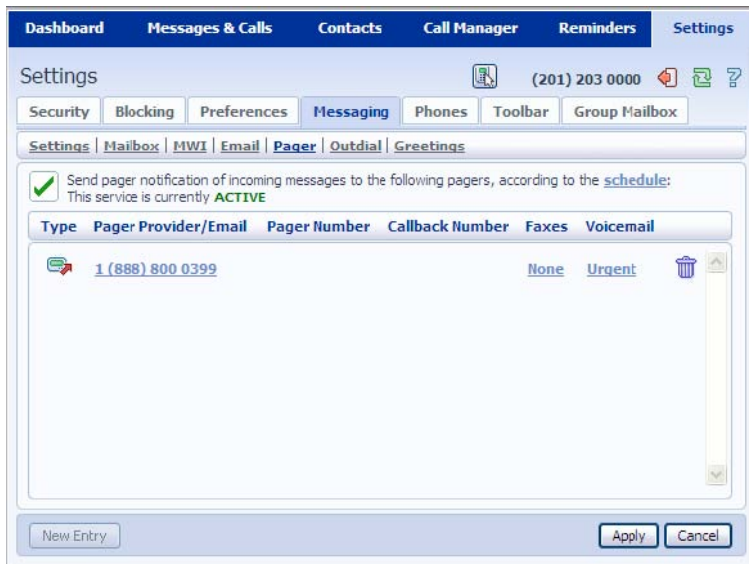
Figure 24: Pager Notifications

Figure 25: New Pager Entry

Pager profiles

If one or more pager profile templates have been defined, you can select a pager from the *Provider* dropdown list.   You will then see the configuration screen shown, but some of the fields will be hidden or will already have been completed. You can then add your remaining configuration and set the schedule for these notifications. You can also configure pagers not included in the list by selecting **Custom** from the dropdown list and completing all the configuration information.

Notification schedule override

You can also override the schedules you have configured for your pager and outdial notifications.   Once activated, only the override schedule applies and notifications are only delivered to the specified phone, email address or pager until a configured expiry date or until it is manually disabled.   You can only activate the override schedule if you have enabled the outdial or pager notifications service.

Figure 26: Notification Schedule Override

3.7.2 CommPortal Assistant

You can use the **CommPortal Assistant** tab under the main **Settings** tab to download CommPortal Assistant, which allows you to

- see a pop-up that appears whenever you receive an incoming call, allowing you to choose to redirect the call to another number or decline the call

- receive notifications of new voicemail messages

- access contacts and synchronize these with your Outlook contacts

- configure call services from your desktop.

Full instructions on how to download, install and use CommPortal Assistant are in Appendix A.

The download page, as illustrated in Figure 29, includes a preview image of CommPortal Assistant.

Figure 29: Download CommPortal Assistant

3.7.3 CommPortal Widgets and Accelerators

CommPortal Widgets embed some of the main features of CommPortal in a range of popular third-party applications.   You can embed CommPortal Widgets into your iGoogle homepage, Microsoft Windows Vista Sidebar or the Mac OS X Dashboard.

Microsoft Internet Explorer 8 introduces the concept of **Accelerators**. IE8 allows users to select text on a web page and then carry out an Accelerator action using the highlighted detail.

The following CommPortal Widgets are available, covering the most commonly used features in CommPortal.

* Voicemail

* Call Lists

* Dialer

The following Accelerators are also available.

* QuickDial Accelerator

Your Class of Service then determines whether or not widgets or accelerators are available to you.

You can configure your widgets and accelerators from the **Widgets** page within the **Settings** Tab. This page presents a list of the widgets and accelerators that are available and prompts you to select the Widget you want to install.   Once a Widget is selected, the panel on the right-hand side displays information about that Widget and provides a link for you to follow to download it to your chosen environment.   CommPortal detects the operating system you're currently using and alters which delivery mechanisms are presented accordingly.

Figure 31: CommPortal Widgets tab
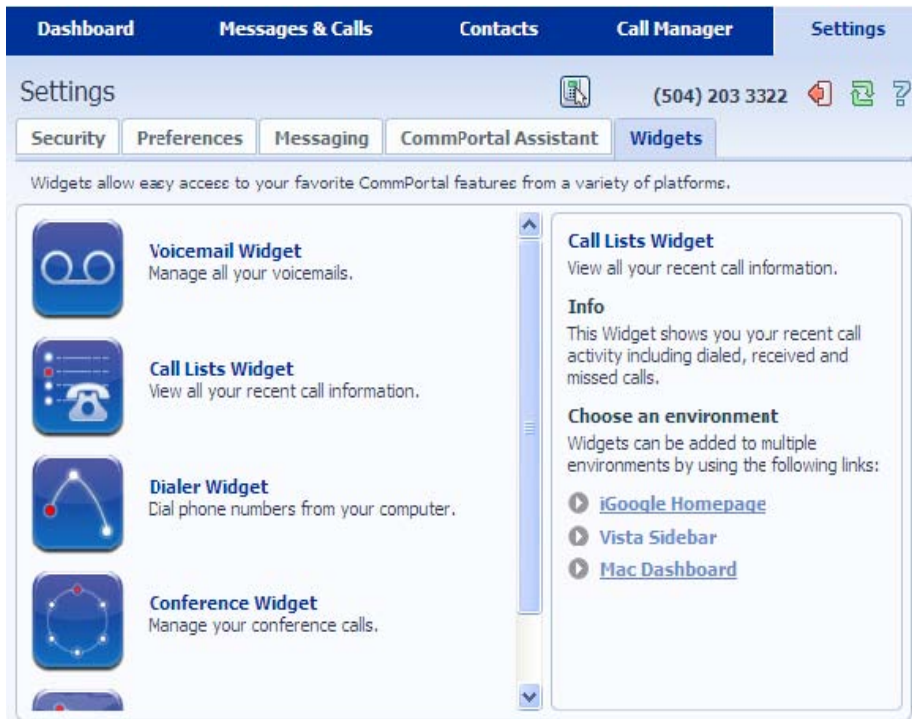
You should follow any further on-screen instructions (which are generated by the third-party software involved) to embed the widget in that environment.

CommPortal always displays the QuickDial Accelerator download icon, even if you don't have or use IE8. *Clicking on the QuickDial Accelerator download button when using a browser that doesn't support accelerators will do nothing.*

The widgets and accelerators themselves will prompt for login details, and you can choose whether or not those details are stored.   If you choose to store your credentials the widget or accelerator will be available when the application starts up; if you do not, you will be asked to enter your login details each time you use the application.

Except when used with the Mac OS X dashboard, each widget includes a shortcut that will launch CommPortal in the default browser.   You do not need to log in again in this case and can use CommPortal in full as normal, although the logout button will not be present.

3.7.3a CommPortal Widgets and Mac OS X

It is possible to embed CommPortal Widgets on the Mac OS X dashboard. CommPortal is currently incompatible with Mac PCs, but a subscriber can use Firefox to access the Widgets tab in CommPortal, to install the Mac OS X widgets only.

We recommend that you do NOT make any other changes to your account using CommPortal on a Mac.   Only use a Mac Widget when on a Mac and use a Windows PC to access CommPortal or Google Widgets.

3.7.4 Call Me

The **Call Me** feature allows you to create a button that you can embed in a website or an email that allows people to call you.   When a third party clicks this button, it directs their web-browser to a page that is used to set up the call. The page prompts them to enter your telephone number and click the Call Me button. The Call Me service then dials out to the specified number and, once the third party answers his/her phone, initiates the call to you.

Figure 32: Call Me page
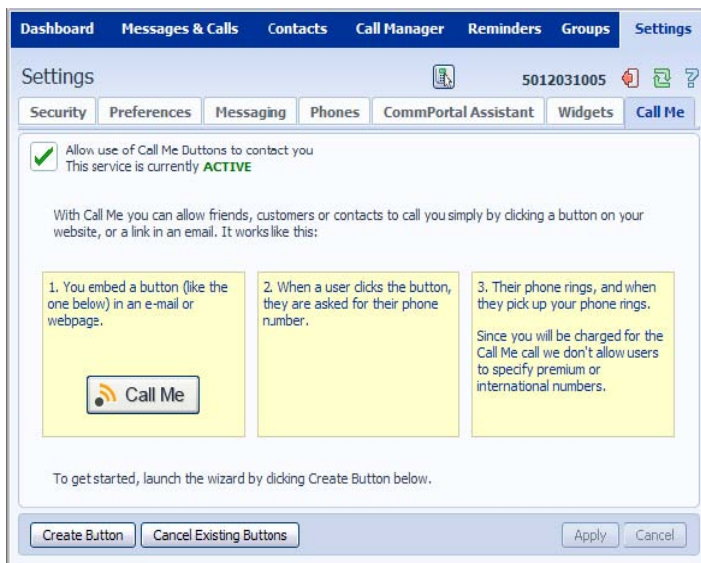
You can configure your Call Me service from the Call Me page within the Settings Tab.

From this page your can

- activate or deactivate the Call Me service
- create a Call Me button
- cancel all existing buttons.

You will use a Wizard for creating Call Me buttons, as illustrated in Figure 33.

Figure 33: Call Me button creation wizard

You enter the telephone number you want calls to be made to and choose the type of button you want to create.   There is the option to make a simple link for use in non-HTML emails or a graphical button for use in web pages or HTML emails.   There is a choice of graphical buttons.   Your then copy and paste the buttons into emails or web pages as necessary.

You can control whether or not your Call Me buttons are active or not from this page. Deactivating the button will mean that potential callers are shown a page detailing that the service is currently unavailable.

You can completely deactivate the service by clicking the Cancel Existing Buttons button. This will cause all currently issued Call Me buttons to stop working permanently, meaning you will no longer be charged for Call Me calls.   If your want to reactivate the Call Me service, you can later recreate your Call Me buttons.

3.8   Reminders tab

The Reminders page shows a list of the Reminders that have been scheduled. It also allows you to create new Reminders and edit or delete existing ones.

Figure 18: Reminders
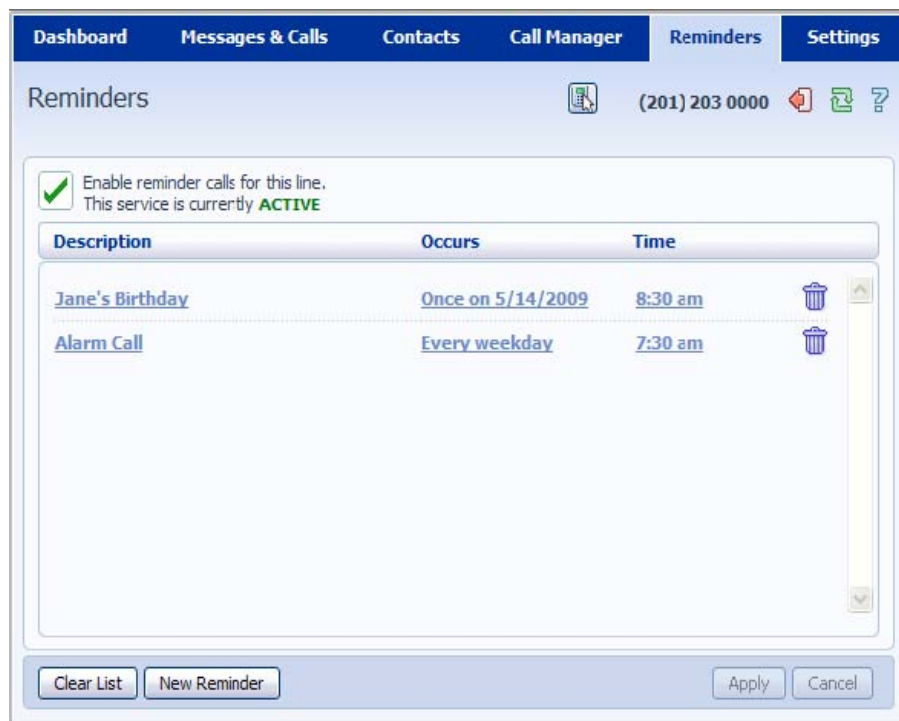
The Reminders tab allows you to:

- enable or disable the reminders service
- view and modify your existing reminders and add new ones
- record and play back the message to be used for each reminder, using the New Reminder or Edit Reminder pop-ups.

3.8.1 Reminder UI

The Reminder UI is used to configure new reminders or edit existing ones.

Figure 19: The Reminder UI for a new reminder

For each reminder, you can use the Edit Reminder pop-up to configure:

- a description for the reminder, to be shown in CommPortal

- whether the reminder is one-off or repeating

- if the reminder is one-off, the date on which the reminder occurs

- if the reminder is repeating, whether the reminder occurs on all days or just week days

- the time of day at which the reminder occurs

- which device (phone) should be notified of the reminder.

The sound control in this UI is used to record and play back the sound used for each reminder.

- If the reminder is already recorded, the sound control displays its duration, and you can play the reminder or re-record it.   It is also possible to delete the reminder sound by clicking the *Delete sound* button in the dialog. The *Delete sound* button is enabled only if there is a reminder sound recorded.

- If the reminder sound is not recorded, the message *Not recorded* is displayed, and you can then record it by selecting the *Record* button. You can also use the controls to adjust microphone and volume settings.

All changes on the reminder sound are submitted to the server with all the other information when the Apply button is pressed. Your must click on Apply before navigating away from the Reminders screen, otherwise any changes made will be lost.

A.   CommPortal and CommPortal Assistant

CommPortal Assistant runs on your own PC, offering a convenient and fully-integrated route into your SyncGlobal account.   Using the toolbar, you can carry out a number of tasks, all from your PC:

- Enable a pop-up that appears when you receive an incoming call on the telephone number you used to log in to CommPortal.   If you do not want to answer the call, you can use the pop-up to either decline the call or redirect it to another telephone number.

- See when you receive new messages in your voicemail box.

- Search your contact lists and place calls to those contacts.

- Make instant changes to your call settings, for example sending calls to voicemail.

- Synchronize your CommPortal contacts with your Microsoft Outlook 2003 or 2007 contacts.

- Place calls with one click from inside Microsoft Outlook.

Before you can make use of the features of CommPortal Assistant, you must first install it on your computer, as described in section A.1.

Section A.2 describes various configuration tasks that you may need to perform to ensure that your CommPortal Assistant Settings are correct.

Once you have installed and configured, if necessary, CommPortal Assistant, section A.3 summarizes the features available to you.   To explore these features in more detail, refer to CommPortal Assistant's online help.

A.1   Installing CommPortal Assistant

You can download and install CommPortal Assistant from within SyncGlobal's web-based tool, CommPortal.

A.1.1 System Requirements

The PC onto which you want to download CommPortal Assistant must have at least 3MB of disk space for installation and be running

- Windows XP (Service Pack 2 or later), or Windows Vista

- Internet Explorer v6.0 or above or Firefox

CommPortal Assistant also requires .NET 1.1, a component of the Windows operating system.   Most PCs already have .NET 1.1.   However, if you do not have .NET 1.1 installed on your computer, the installation process will provide you with a link to download it from Microsoft and install it on your PC.   This download is free.

You also need administrator privileges to install CommPortal Assistant.   You will usually have these privileges if you are installing the software on your own computer, but you may need to contact your network administrators if you are using a company-owned PC or are in a similarly controlled environment.

A.1.2 Downloading CommPortal Assistant

- Log into your account using CommPortal.

  - SyncGlobal customers use **http://commportal.syncglobal.net/portal** to log into their accounts.

  - Log in using your telephone number and your PIN (what you normally use to access CommPortal and voicemail).

- Click *Settings* on the navigation bar.

- Click *CommPortal Assistant*.

- You are then taken to the CommPortal Assistant display, from where you can download the tool. This display also shows the minimal system requirements for downloading and using this tool, as described in section A.1.1.

Figure 56: The CommPortal Assistant download page
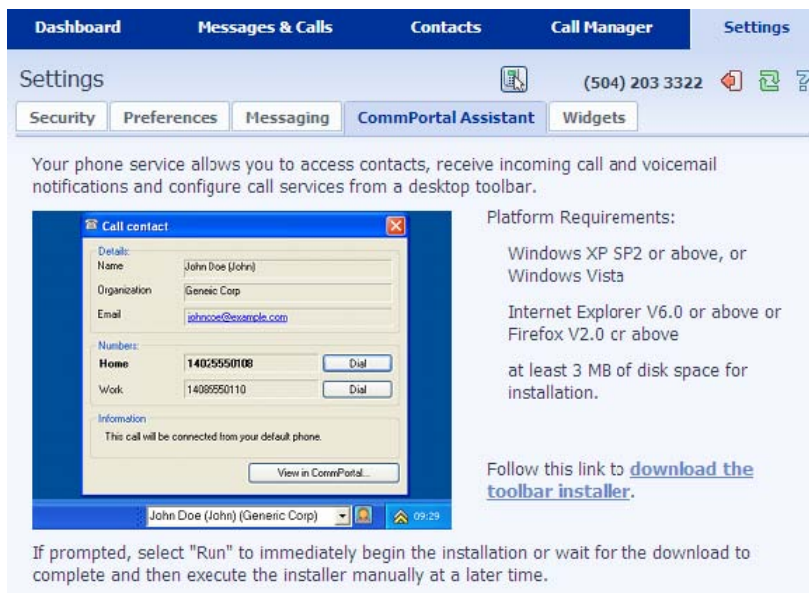
- Click *download the toolbar installer* to download the installation package ToolbarInstaller.msi. You will see a pop-up dialog box similar to that illustrated in Figure 57 below.

Figure 57: Security warning on download of CommPortal Assistant installation package

- Click *Run* to install CommPortal Assistant immediately, or *Save* to download it and install it at a later date.

A.1.3 CommPortal Assistant Installation Wizard

Once you have downloaded CommPortal Assistant, you can use the CommPortal Assistant Setup Wizard to install the toolbar on your PC.

- If you chose *Run* when prompted by the dialog box in Figure 57, the installer will launch automatically.   If you chose *Save*, when you are ready to begin installing CommPortal Assistant, open the location you saved it to and double-click the *ToolbarInstaller* icon.

- If you are using Windows Vista, a security dialog may appear, asking you to confirm that you wish to install the new software.   Select *Allow* or *Continue* to proceed with the installation.

- The CommPortal Assistant Setup Wizard begins.

Figure 58: The CommPortal Assistant Setup Wizard
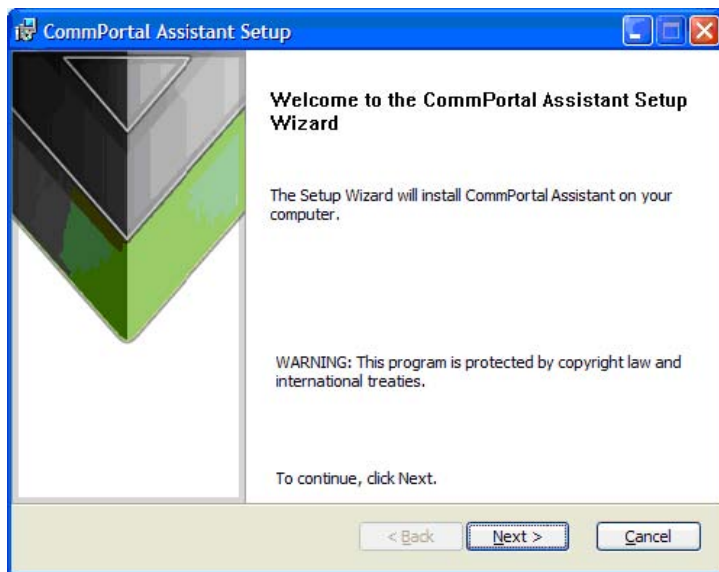
- Click *Next*, then read the End User License Agreement.   If you accept it, select *I accept the terms in the License Agreement* and click *Next* again.

- If your computer supports multiple users, you must then select whether you want to make the tool available to all users, or only to you.   This choice is illustrated in Figure 59.

  Even if you choose to make the tool available to all users, your SyncGlobal account remains secure. Each user must enter his/her own login details to access his/her mailbox.

Figure 59: Selecting the users on the PC for whom CommPortal Assistant is available
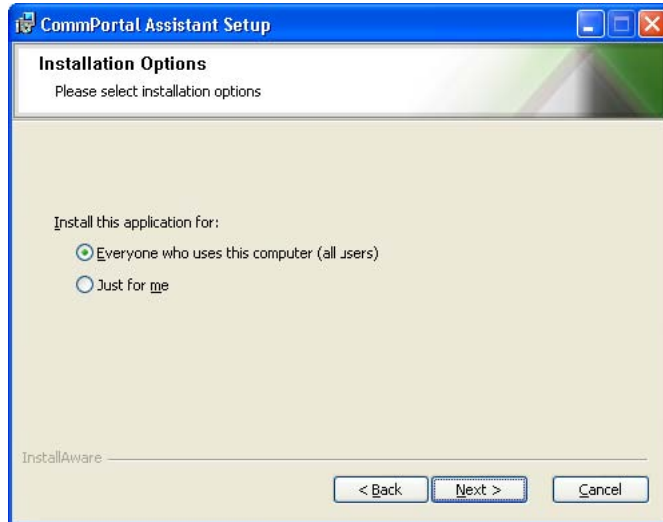
- You are then asked whether you want to install the complete package or a custom package, as shown in Figure 60.

Figure 60: Selecting a complete setup
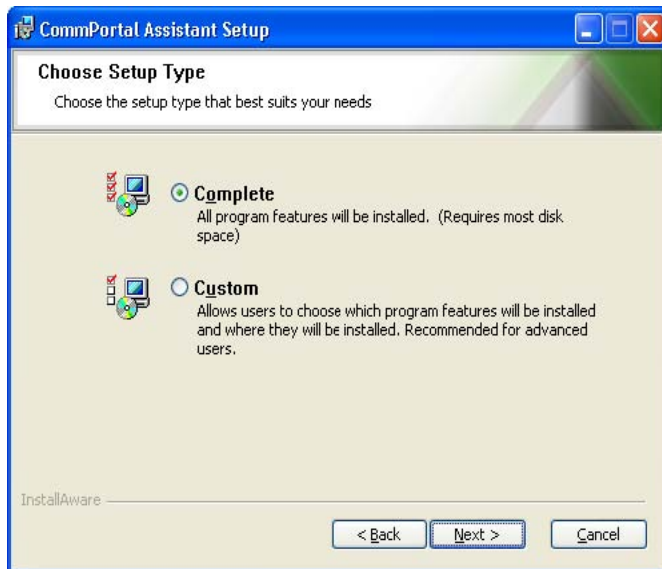
- Select *Complete* and then click the *Next* button.
- Finally, you are asked to confirm your settings, as shown in Figure 61.   Select *Install* to continue.

Figure 61: Initiating the installation
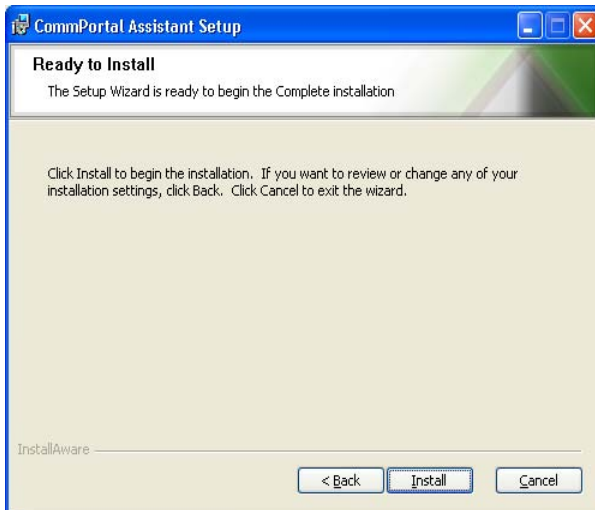
- CommPortal Assistant is then installed on your PC using the settings you configured.

- Once complete, you are given the option to start the toolbar, as shown in Figure 62. Select *Launch CommPortal Assistant* and click *Finish* to complete installation.

Figure 62: Installation complete
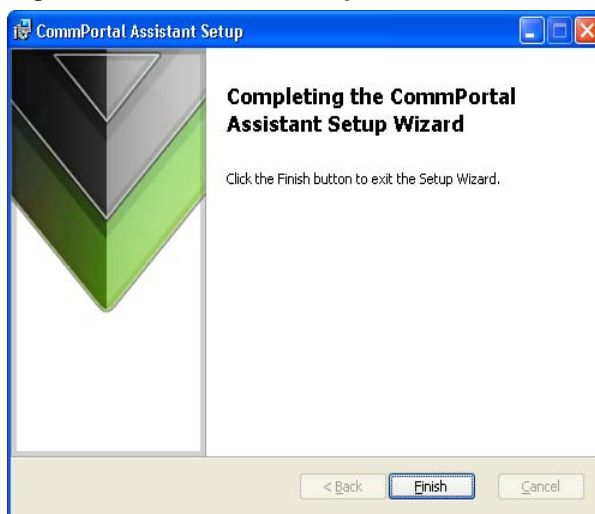
- A screen will pop up asking if you want restart your computer immediately.   Pressing YES will cause an automatic restart.   Choosing NO gives you the chance to save and close other programs.   Then you must manually restart your computer to complete the installation.

- After the restart, verify that CommPortal Assistant appears in your Windows Taskbar and Notification area (usually towards the bottom-right of your screen).   This is illustrated in Figure 63.

Figure 63: The CommPortal Assistant and Notification area icons on the Taskbar
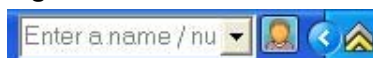
- If CommPortal Assistant is not visible, right-click on your Windows Taskbar, select *Toolbars*, and then click *CommPortal Assistant*.

- If you have Outlook 2003 or Outlook 2007 installed on the same PC as CommPortal Assistant, the first time you launch the toolbar you will see a balloon message alerting you to CommPortal Assistant's synchronization feature described in section A.3.5. This feature enables you to automatically synchronize your CommPortal Assistant and Outlook contacts once you have set up the necessary configuration, as described in section A.2.3.

This completes the installation process for CommPortal Assistant.

A.2   Configuring CommPortal Assistant Settings

CommPortal Assistant cannot log in automatically until you configure your settings manually as follows:

- Right-click on the CommPortal Assistant notification icon.
- Select Configure to launch the Settings menu.

The dialog box shown in Figure 64 appears.

Figure 64: CommPortal Assistant Settings Menu
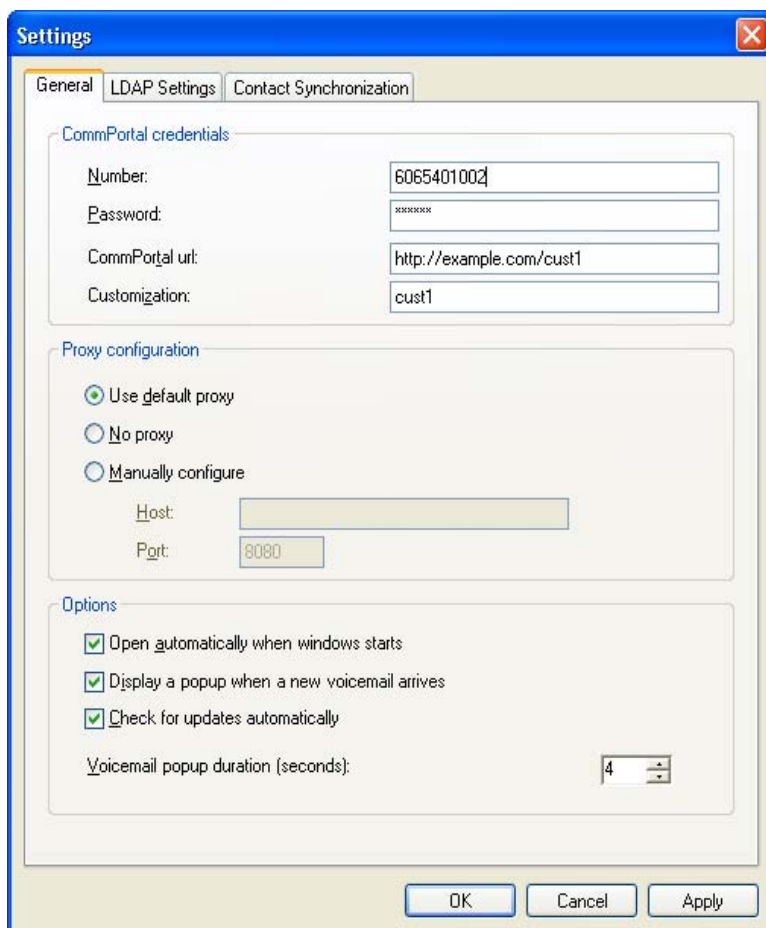
The *Settings* dialog boxes display the details that CommPortal Assistant uses to access your account.   The *General, LDAP Settings,* and *Outlook Synchronization* tabs are each described below.

A.2.1 General Tab

This screen is split into a number of sections.   The *CommPortal credentials* section contains the following fields.

- *Number* – this is the phone number you use to access your CommPortal account.

- *Password* – this is the password used to access your CommPortal account. This is the same as your PIN.

- *CommPortal url* – SyncGlobal customers use **http://commportal.syncglobal.net**

- *Customization* – this specifies which version of CommPortal you use.   SyncGlobal customers use **portal**

The *Proxy configuration* section contains information used to access your account.   You should just select *Use default proxy*.

The *Options* section allows you to alter the behavior of CommPortal Assistant.

- *Open automatically when Windows starts* – check this if you want the toolbar to open each time you turn on your computer.

- *Display a popup when a new voicemail arrives* – check this if you want an on-screen dialog box to popup each time a new voicemail is delivered to your account.

- *Check for updates automatically* – check this if you want CommPortal Assistant to find out and tell you if there are updates available.

- *Include Business Group contacts in searches* – check this if you want CommPortal Assistant to return results from your Business Group contacts as well as your personal contacts when you type in the toolbar's input field.   This item is enabled by default.

- *Voicemail popup duration (seconds)* – this determines for how long your popup dialogs are visible before they disappear.   Remember that, if you have unheard voicemails, the notification icon will change color as well.

Once you have completed all these fields, click *OK* to save your changes and close the Settings tab.

A.2.2 LDAP Settings tab

You should not have to make any changes to this.

A.2.3 Contact Synchronization tab

If you have Outlook 2003 or Outlook 2007 installed on the same machine as CommPortal Assistant and have configured at least one profile within Outlook, you will also see the *Outlook Synchronization* tab illustrated in Figure 65.   This enables you to configure the options for synchronizing any changes made to your Contacts in either Outlook or CommPortal.

Figure 65: Outlook Synchronization tab
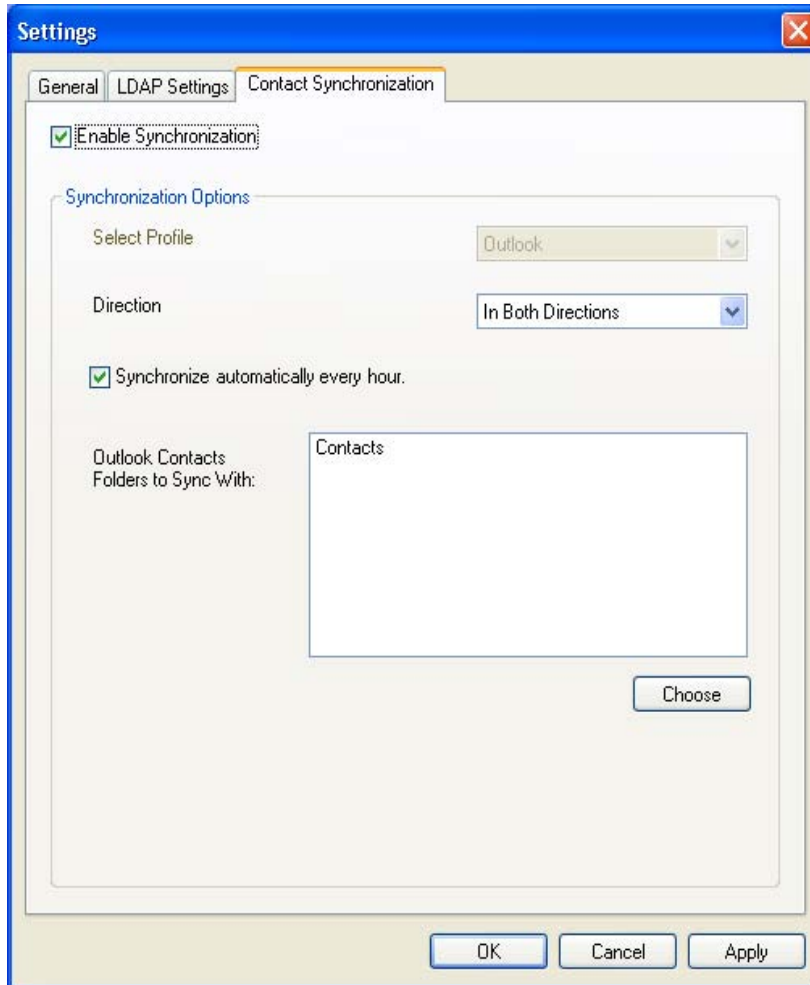
This tab has the following options:

- *Enable Synchronization* – this will be disabled by default on installation or upgrade of CommPortal Assistant, and all the other settings will be grayed out. You should check this box to enable synchronization and make the other settings on the tab editable, as illustrated above.

- *Select Profile* – if you have configured multiple profiles within Outlook and have not set a default profile, the dropdown box will display an alphabetically sorted list of all profiles.   You must select a profile before synchronization can occur, and you will see a validation error if you attempt to submit the page without selecting a profile. If you have only one profile or have configured a default profile, this will be shown, and the field will grayed out.

- *Synchronize automatically every hour* – this will be enabled by default, and synchronization will occur automatically at the interval indicated.   Turn off this option if you only want to run the synchronization process manually using CommPortal Assistant.

- *Direction* – this allows you to specify the direction in which you want the synchronization to occur. The options are *Both directions, From Outlook only,* and *To Outlook only.* The default option is *Both directions.*

- *Outlook Contacts Folders to Sync With* – this indicates which Outlook folders will be included in the synchronization. The default is *Contacts*. Note that you cannot deselect this Contacts folder.

   You can use the *Choose* button to display a tree-view list of possible folders within your Outlook mail store, each with an associated checkbox to indicate whether this folder should be included in the synchronization.

If you change your Outlook profile using the Select Profile button described above, the Folder list is reset to include just the default Contacts folder.   You cannot use the Choose button if you have not selected a Profile.

Once you have completed the configuration, select *OK* to submit your changes.

- If you have enabled synchronization, you will then be prompted to either synchronize immediately or disable synchronization.

- If you choose to synchronize immediately, a foreground synchronization will start, as described in section A.3.5.

A.2.4 Incoming Calls tab

This screen has two options.

- *Display a popup when your phone rings* – check here to enable the pop up display that shows an incoming caller's information.   From that pop-up, you can decline or redirect the call.

- *Call Redirection* – Save names (optional) and phone numbers of up to 5 destinations to which you can redirect calls.

A.3   Using CommPortal Assistant

CommPortal Assistant includes the following components to help you manage your account from your computer desktop.

- **Incoming Call Pop-up** – allowing you to see details of incoming calls as they arrive and optionally decline the call or redirect it to another number.

- The **Notification Icon** – found in the notification area (usually at the bottom right of your screen next to the clock).

- The **toolbar** – embedded in the Windows taskbar (usually at the bottom of your screen).

- **Outlook Integration** – allowing you to make calls from within Microsoft Outlook.

These components are described in more detail below.

A.3.1 Incoming Call Pop-up

As described in section A.2.4, you can configure CommPortal Assistant to display a pop-up each time you receive an incoming call on the telephone number you used to log in, as illustrated below.

Figure 67: Incoming Call Pop-up

This pop-up

- displays the number of the caller, or shows `Unknown number` if this has been withheld by the caller
- displays the name of the caller if this can be determined
- allows you to dismiss the pop-up without affecting the call by pressing the `x` button
- allows you to decline the call by pressing
    - *Send to Voicemail*, if you have the Voicemail service
    - *Decline call*, if you do not have the Voicemail service, when the caller will then hear a message that you are unable to answer the call
- allows you to redirect the call to one of the pre-configured telephone numbers in the dropdown box (see A.2.4):
    - if you have only configured one call redirection name/number, a button is provided instead, for example
    - if you have not yet configured any call redirection numbers, you will see a link to the page where you can configure these (see A.2.4)

A.3.2 The Notification Icon

The Notification Icon indicates whether you have unheard messages or unresolved conflicts between your Contacts Lists in CommPortal and Outlook and whether or not you are connected to your account.   You can also access CommPortal directly from the Notification Icon, without needing to visit a login screen.

- The Notification Icon shows the following possible conditions.

     – You have unheard voicemails.

     – You are connected to your account, but you have no unheard voicemails.

     – There is an error connecting to your account.

     – There are unresolved conflicts between your CommPortal Contact Lists and your Outlook contacts following synchronization.

- Double-clicking the Notification Icon opens CommPortal on the Dashboard display.
- Right-clicking the Notification Icon brings up the following menu.

Figure 68: Right-click menu of the Notification Icon
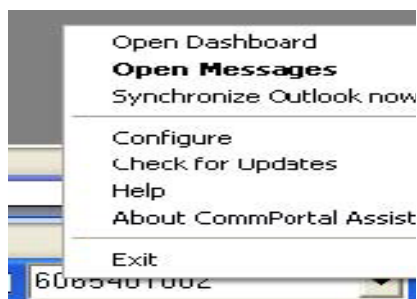
You can choose from the following options.

- *Open Dashboard* – opens CommPortal at the Dashboard display.

- *Open Messages* – opens CommPortal at the Messages display.

- *Synchronize Outlook now* – allows you to run an immediate synchronization between your Contact Lists in CommPortal and Outlook.

- If you have already synchronized your Contacts and you have unresolved conflicts between entries in your Contact Lists, you will instead see the option *Resolve Contact Synchronization Conflicts.* Section A.3.5 describes how to run synchronizations and resolve any conflicts.

- *Configure* – opens the CommPortal Assistant settings page.   For a full description, see section A.2.

- *Check for updates* – looks for software updates.

- *Help* – opens the online help in your default web browser.

- *About CommPortal Assistant* – gives details about CommPortal Assistant, and includes buttons to generate diagnostics. For a full description, see the online help.

- *Exit* – closes CommPortal Assistant (which closes both the Notification Icon and the Toolbar).

A.3.3 The CommPortal Assistant toolbar

If the CommPortal Assistant toolbar does not appear despite installing CommPortal Assistant, right-click on your Windows Taskbar, select Toolbars, and then click CommPortal Assistant.

The toolbar allows you to control your status and to initiate outgoing calls.

Figure 69: Setting your call services

A.3.3a Changing your status

The icon at the right of the toolbar displays your current phone status.   Hover over the icon for more information. To change your status, right-click on the status icon to select from the options presented.

For example, if you have the default set of available settings, the icons and the corresponding menu options are as follows.

– *Ring my phone*- your phone will ring as normal.

– *Do not disturb* – all calls will go to your voicemail and your phone will not ring.

– *Forward calls* – will forward calls, either to voicemail or to another number you can select or specify, rather than making your phone ring.

If you also subscribe to the Incoming Call Manager or FMFM services, you will see more icons and have a greater range of options to select from.   See online help for full details.

A.3.3b Making calls from CommPortal Assistant

You can also use the toolbar to make an outgoing call.   To start a call, begin typing in the text entry box inside the toolbar.   As you type, the toolbar will automatically offer suggestions from your contact list.

If you are a member of a Business Group, these suggestions will include the names of any Business Group Line contacts as well as your personal contacts, unless you have explicitly excluded these on the Settings page as described in A.2.1.   Business Group Line contacts will be identified by an icon   and will also show the Department (if this information is available).

Figure 70: Finding a contact to call

You can also enter a telephone number in the text entry box, whether that number is in your contact list or not.   You should either enter the telephone number of the person you want to call (including the area code) or, if you are a member of a Business Group, you can enter an extension number.

Once you have found the contact you want, your details are shown as illustrated in Figure 71.   (If the contact you have selected is a Business Group Line, this screen will show only the contact's Name, and Department if available; the *View in CommPortal* button is not displayed for BG Line contacts.)

Figure 71: Call Contact page

- Click *Dial* to initiate a call to this contact.

- Your own phone will then ring.   When you pick it up, SyncGlobal places the call to the chosen contact.   You will hear a ringing tone as though you had dialed the number yourself.

- You will see a pop-up that displays the status of the call and allows you to end the call at the press of a button.   Once the pop-up disappears, you can end the call by hanging up the phone.

A.3.4 Making calls from Outlook

If you use Microsoft Outlook, after you have installed CommPortal Assistant, you will find a new ⬚ button on each Contacts page in Outlook.

To place a call to the contact, click the ⬚ button. The following dialog opens, and you will need to enter relevant details in each field.   You can either enter the name of a contact or the number directly.   If you enter the number directly, you should either enter the telephone number of the person you want to call (including the area code) or, if you are a member of a Business Group, you can enter an extension number.

To make the call click Start Call.

Figure 72: Outlook call contact page
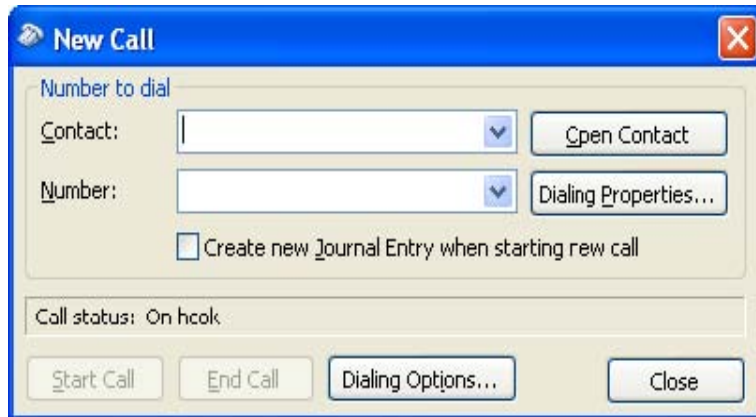
See the CommPortal Assistant online help for full details of this feature.

A.3.5 Synchronizing CommPortal and Outlook Contact Lists

If you use Outlook 2003 or Outlook 2007 on the same PC as CommPortal Assistant, you can configure CommPortal Assistant to synchronize your Contact lists – so that a change made in one application is applied to the other.

You can synchronize your contact lists on demand or set synchronization to happen automatically at a pre-defined interval.   Refer to section A.2.3 for instructions on how to configure these settings.

If you have enabled synchronization, you will see either *Synchronize contacts now* or *Resolve Contact Synchronization conflicts* when you right-click on the Notification icon (usually at the bottom-right of your screen next to the clock).   These two options are described below.

A.3.5a Synchronizing Contact Lists

If you choose the option *Synchronize contacts now,* synchronization will start immediately.   You will see the screen shown in Figure 73 describing the progress of the synchronization operation.

If an automatic background synchronization is already in progress, this window will reflect the status of that background operation.

Figure 73: Synchronization Progress Window
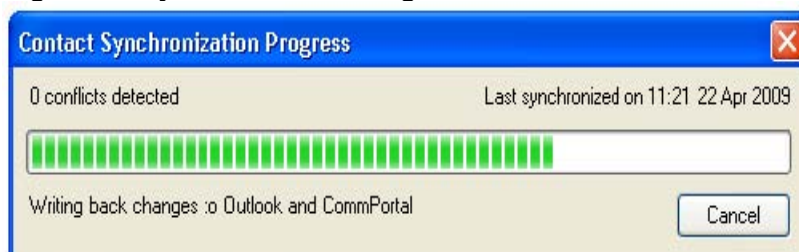
- This window shows the progress of the synchronization process, including the number of contacts read so far and the total number of contacts downloaded for processing.

- Selecting *Cancel* will abort the current synchronization. Changes made up to the point at which *Cancel* was clicked will still be applied.

- You can use the minimize button to close the dialog and allow the synchronization to continue as a background synchronization.

- Once synchronization is complete, the window will either close automatically or, if there are errors, remain open and indicate what the problem is.

- If there are any synchronization conflicts, the window shown in Figure 74 below will open automatically as soon as synchronization completes.

Figure 74: Conflict Resolution Window
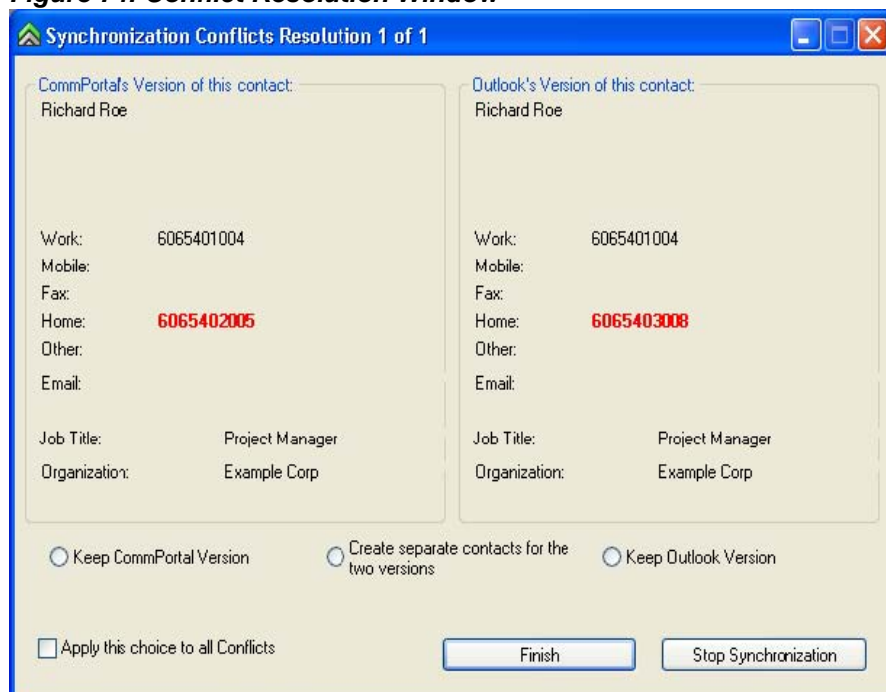
A.3.5b Resolving synchronization conflicts

A synchronization conflict occurs if you have made changes to both the CommPortal contact list and your Outlook contacts since the last synchronization.

If there are conflicts, you will see an exclamation mark next to the notification icon (usually at the bottom-right of your screen next to the clock).   You can then select *Resolve Contact Synchronization conflicts* to open the Conflict Resolution Window.

You may also see a balloon appear next to the icon when an automatic synchronization completes.   You can click on this balloon to open the Conflict Resolution Window.

The Conflict Resolution Window, shown in Figure 74, displays details of a single conflict. Once you have resolved this conflict, the window automatically changes to display the next conflicting contact until all have been resolved.

- The dialog title indicates how many conflicts require resolution.

- The CommPortal and Outlook Contact List entries are displayed side-by-side, with the conflicting fields clearly indicated.

- You can select one of the following buttons to resolve the conflict.   This option will then become the default option for subsequent conflicts, even if the next conflict occurs during a later synchronization.

  - *Keep CommPortal Version* – the Outlook field is updated with the information in the CommPortal field.

  - *Create separate contacts for the two versions* – the conflict is unresolved.

  - *Keep Outlook Version* – the CommPortal field is updated with the information in the Outlook field.

- You can also apply this option to all the conflicts in your lists by checking the radio button alongside *Apply this choice to all conflicts*. This will resolve all outstanding conflicts in the same manner.

- Select *Continue* to apply any changes and move on to the next conflict, or *Stop Synchronization* to leave this and any subsequent conflicts unresolved.

When you run the synchronization process for the first time, you may have multiple potential matches in CommPortal for a contact in Outlook or vice versa, and these will be indicated as the synchronization proceeds.

If multiple matches are found, you will see a similar screen to that shown in Figure 74.

- The Outlook contact's details are displayed on one side of the screen with all the possible matches within your CommPortal contacts on the other side of the screen.

- Using the radio buttons, you can either select one of your CommPortal contacts as the contact details you want to synchronize or import the Outlook entry as a new Contact.

- Once you select a match to use and press *Continue,* CommPortal Assistant will attempt to synchronize the selected CommPortal contact with the Outlook contact.

- You should select *Stop Synchronization* to close the window and leave the conflict unresolved.

A.3.5c Outlook/CommPortal Account Changes

If you have enabled synchronization and subsequently make any changes to your Outlook or CommPortal account – for example to change your default Outlook profile or your CommPortal account username – you will be prompted to confirm whether synchronization is still required with the new account.

If you do not wish to synchronize with the new account, select *Disable Synchronization*. You can later re-enable synchronization, or change your settings, using the *Settings* dialog described in section A.2.3.

Figure 75: Account Details Changed

C.   Using Call Me

The Call Me feature allows you to create buttons and links that you can embed in a website or email that allows them to initiate a call with you.   When someone clicks on the button or the link, they are taken to a website where they are prompted to enter your phone number.   Once they have entered a number their phone will ring; when they answer, your phone starts ringing.

This offers essentially the same service to your contacts as a toll-free number, but allows you to control and manage the service from CommPortal.

C.1   Creating a Call Me button

You create and manage Call Me buttons using CommPortal.   CommPortal includes full instructions on how to create the buttons, but here is a quick overview.

- Log into your account using CommPortal.
  - SyncGlobal customers will use **http://commportal.syncglobal.net/portal** to log into their accounts.
  - Log in using your telephone number and your PIN (what you normally use to access CommPortal and voicemail).
- Click *Settings* on the navigation bar.
- Click *Call Me*.
- You will then see the following page.

Figure 93: Call Me page
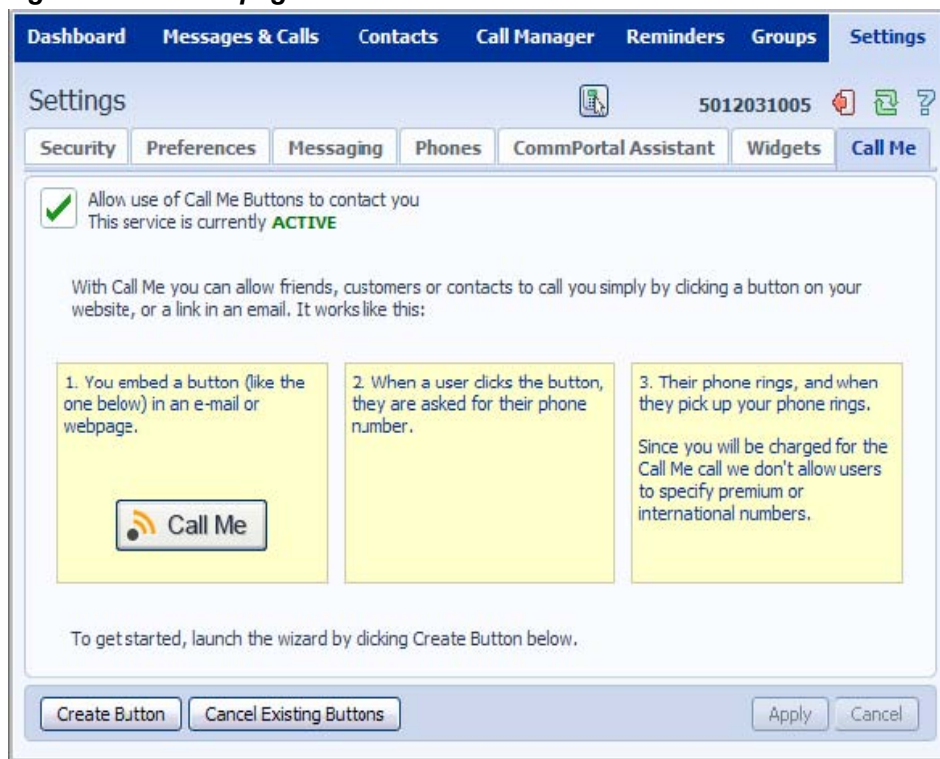
- To create a button, click *Create Button.*

Figure 94: Call Me button creation wizard
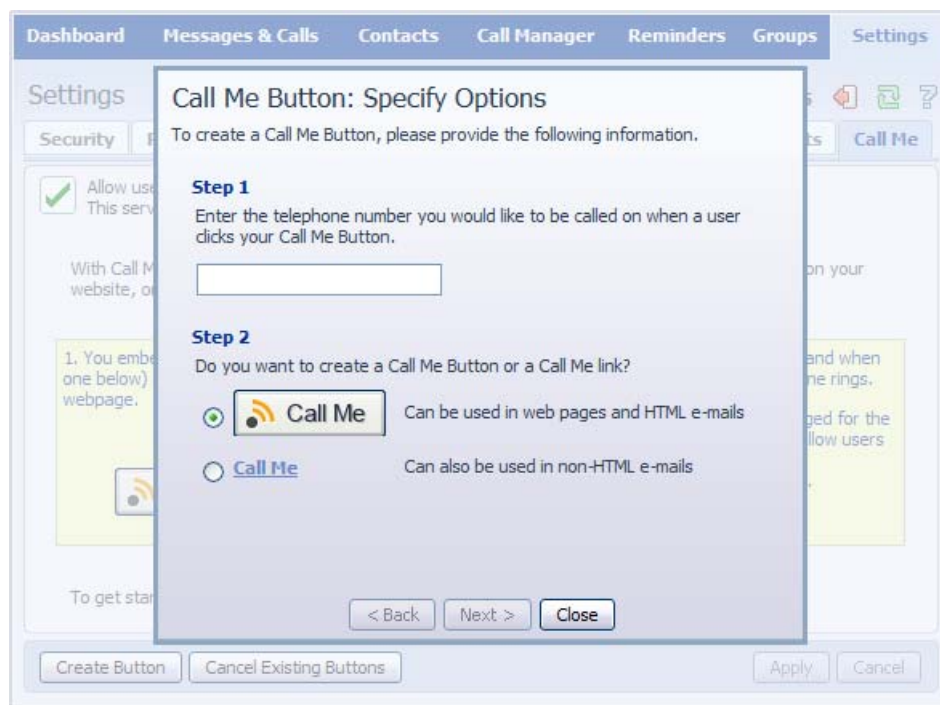
- Enter the number of the phone on which you want to be called when people click your Call Me button.

- You then can chose whether you want to create a graphical button to embed in a website or HTML email or a text-based link for use in non-HTML emails.

- If you are creating a graphical button, you can then select which button you want to use.

Figure 95: Call Me button selector

- Once you have selected the button, you are then presented with the detail you need to copy in to your email or website as appropriate.

Figure 96: Call Me Buttons presentation page

- Copy and paste the image (using the *Select Button*) or text as necessary.
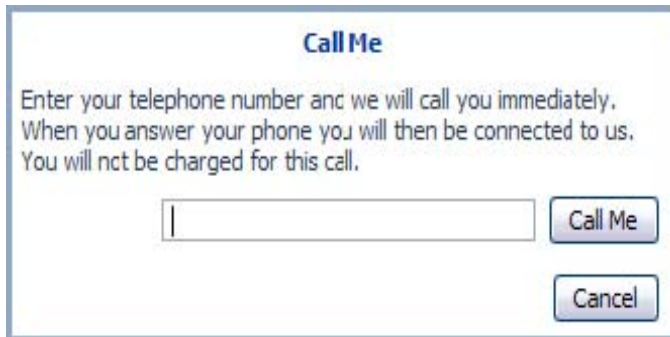
C.2   Managing your Call Me buttons

Once you have created your Call Me buttons, you can control whether or not the service is active, and if necessary, revoke all existing Call Me buttons.

- You can control whether or not the Call Me service is active from the Call Me page within CommPortal. When inactive, your existing Call Me buttons will not connect to your chosen phone. Instead, when your potential callers click your Call Me button, they are presented with a message stating that they should try again later. You can reinstate the service at any time using the same selection button.

- You can also completely revoke all your existing Call Me buttons.   This will permanently deactivate any exiting Call Me buttons even if your service is currently active. Any new buttons you create will behave as normal.

C.3 Call Me experience

When a potential caller clicks your Call Me button the following page opens in your default browser.

Figure 97: Call Me link – active

The page itself includes clear instructions on how to use the button. Potential callers simply enter their contact number in the field (they are prevented from entering a premium-rate number) and presses the Call Me button. Their phone then rings; when they pick up, your chosen number will then ring.

If you have temporarily suspended your Call Me service, the following page is shown instead.

Figure 98: Call Me link – inactive