CommPortal Assistant
USER GUIDE

enTouch
BUSINESS

CONTENTS

1.0 Features

Subscribers can use the **CommPortal Assistant** app under the main **Apps** tab to download CommPortal Assistant, which allows them to:

- See a pop-up that appears whenever they receive an incoming call, allowing them 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 their Outlook contacts

- Configure call services from their desktop

The download page, as illustrated in Figure 1, includes a preview image of CommPortal Assistant.

1: Download CommPortal Assistant

2.0 Introduction

CommPortal Assistant runs on your own PC, offering a convenient and fully-integrated route into your MetaSphere 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 MetaSphere mailbox

- Search your contact lists and place calls to those contacts

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

- Synchronize your CommPortal contacts with your Microsoft Outlook 2003, 2007 and 2010 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 1.

Section 2 describes various configuration tasks that you may need to perform to ensure that your CommPortal Assistant Settings are correct. However, your Service Provider may already have done this for you.

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

3.0 Installing CommPortal Assistant

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

3.1 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:

Note: CommPortal Assistant is not supported on Windows 2000

- Internet Explorer 6.0 or above, or Firefox 2.0 or above

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.
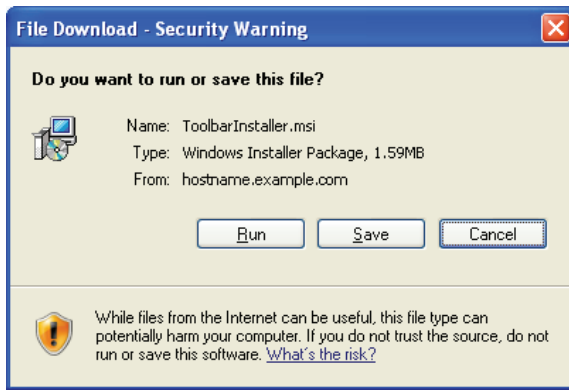
3.2 Downloading CommPortal Assistant

- Log into your account using CommPortal.

  - From your web browser enter the CommPortal Assistant URL in the address bar: **http://voice.entouch.net**

  - Log in using your telephone number, and your PIN or password (whichever you normally use to access CommPortal).

- Click **Apps** 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 1.1.

Figure 56: The CommPortal Assistant download page

- Click **XP/Vista/Windows 7/Windows 8** to download the installation package **ToolbarInstaller. msi**. You will see a pop-up dialog box similar to that illustrated in Figure 3.

**Figure 3:** 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.

3.3 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.

Figure 4: The CommPortal Assistant Installation Wizard
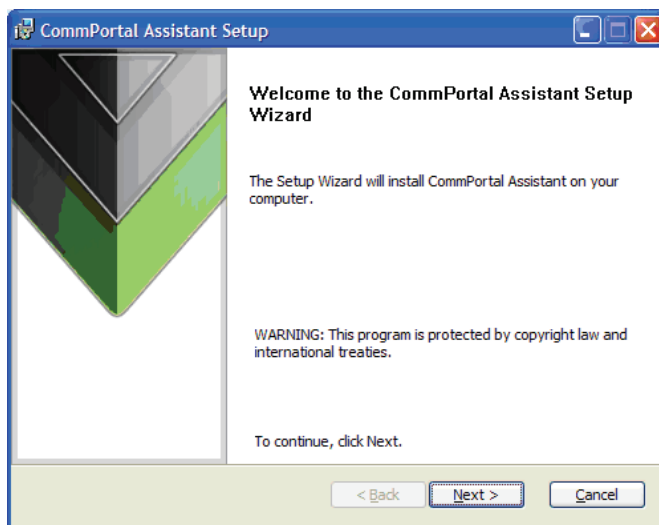
- If you chose **Run** when prompted by the dialog box in Figure 3, the installer will launch automatically. If you chose **Save**, when you are ready to begin installing CommPortal Assistant, open the location you saved it to and double-click the **ToolbarInstaller** icon.

- 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.

- 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 5.

- Even if you choose to make the tool available to all users, your MetaSphere account remains secure. Each user must enter their own login details to access their mailbox on MetaSphere.

Figure 5: Selecting the users on the PC for whom CommPortal Assistant is available
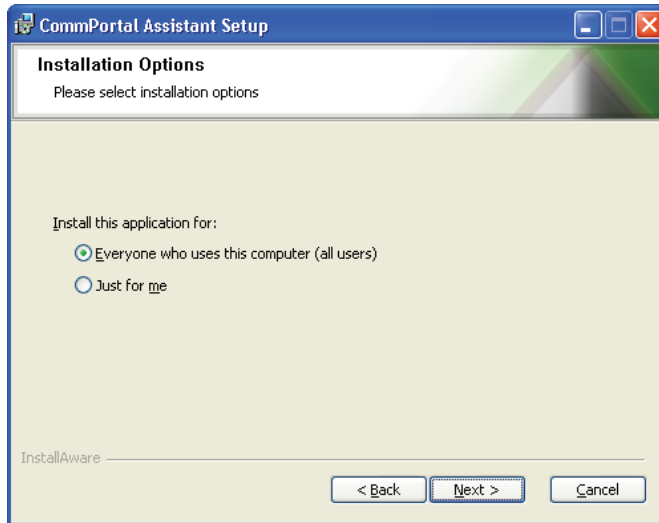

- You are then asked whether you want to install the complete package or a custom package, as shown in Figure 6.

Figure 6: Selecting a complete setup
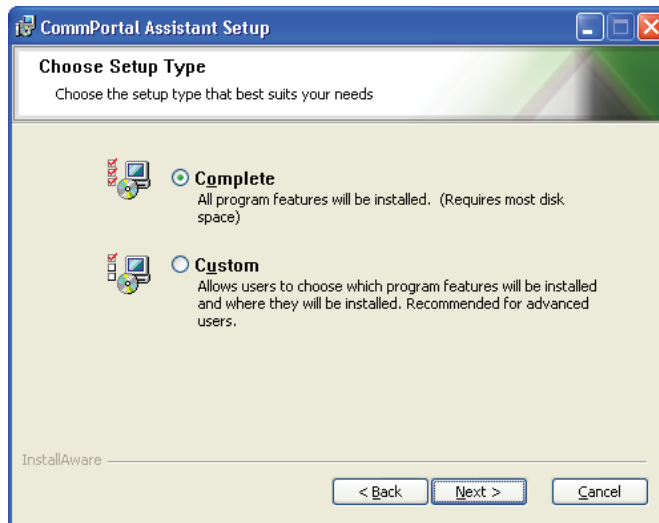
- If you are an experienced user, you may wish to select custom options. Otherwise, we suggest you install the complete package. Select **Complete** and then click the **Next** button.

- Finally, you are asked to confirm your settings, as shown in Figure 7. Select **Install** to continue.

Figure 7: Initiating the installation
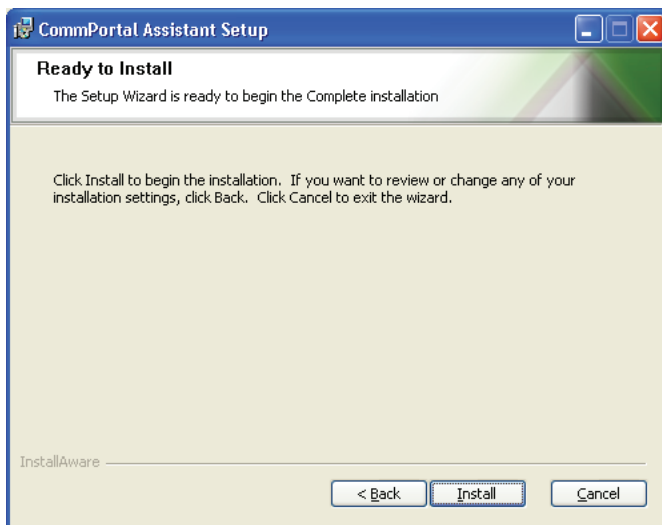
- CommPortal Assistant is then installed on your PC using the settings you configured.

- Once complete, you are given the option to start the toolbar, as shown in Figure 8. Select **Launch CommPortal Assistant** and click **Finish** to start using the feature immediately.

Figure 8: Installation complete
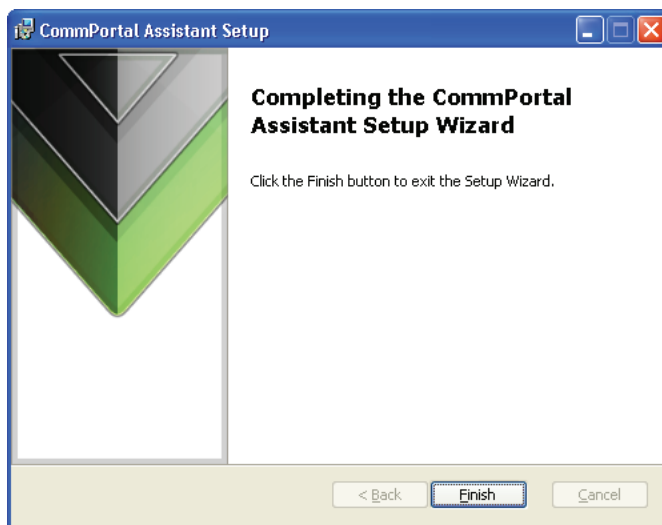
- Finally, verify that CommPortal Assistant appears in your Windows Taskbar and Notification area (usually towards the bottom-right of your screen). This is illustrated in Figure 9.

Figure 9: The CommPortal Assistant and Notification area icons on the Taskbar
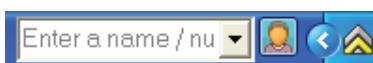
- If CommPortal Assistant is not visible, right-click on your Windows Taskbar, select **Toolbars**, and then click **CommPortal Assistant**.

■ 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. 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 2.3.

This completes the installation process for CommPortal Assistant.

4.0 Configuring CommPortal Assistant Settings

If your Service Provider has not customized the installer or you want to alter your settings, for example to exclude Business Group contacts from searches, you will have to 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 10 appears. If you also have the Incoming Call Popup feature, you will see a fourth tab on this menu, **Incoming Calls**.

Figure 10: CommPortal Assistant Settings Menu
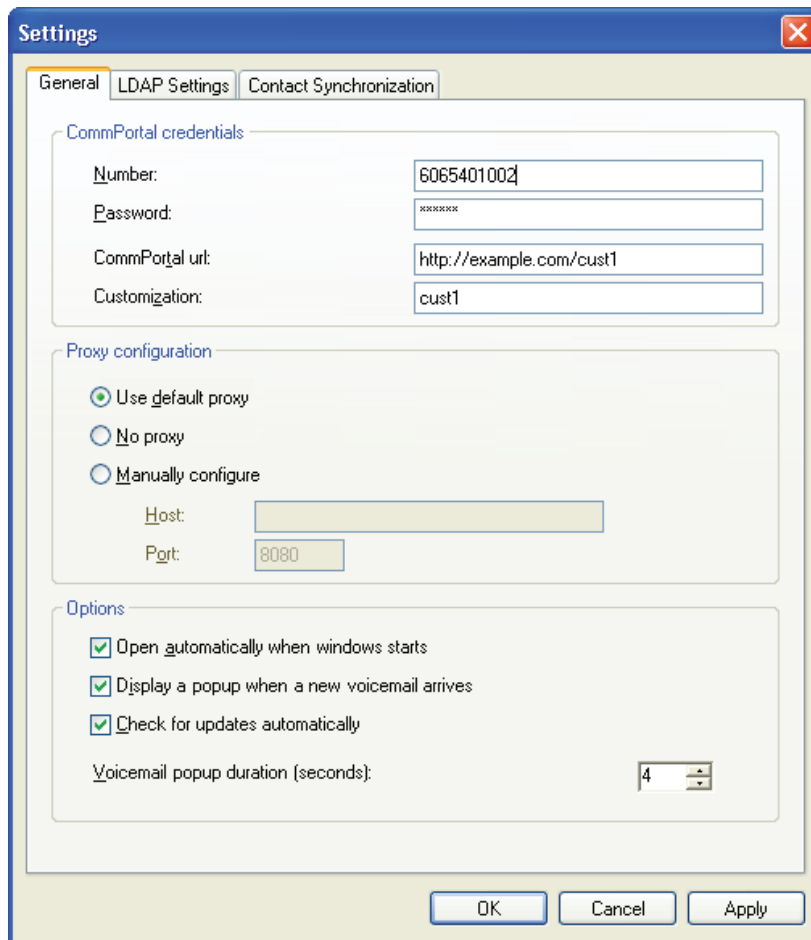
The **Settings** dialog boxes display the details that CommPortal Assistant uses to access your account. The **General**, **LDAP Settings**, **Outlook Synchronization** and **Incoming Calls** tabs are each described below.

4.1 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. Depending on your service provider, this may be the same as your PIN, or may be a separate password you use only for CommPortal.

- **CommPortal url:** this is part of the web address used to access your CommPortal account.

- **Customization:** this specifies which version of CommPortal you use. For example you may use a different language, or have chosen a specific appearance for your CommPortal interface.

The **Proxy configuration** section contains information used to access your account. Your service provider will tell you if you need to use **No proxy** or **Manually configure**, otherwise 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.

- **D**isplay 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, but will not be shown if you are not a member of a Business Group.

- **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, you should either select one of the other two tabs—for example if you want to enable Contact Synchronization as described in section 2.3—or click **OK** to save your changes and close the **Settings** tab.

4.2 LDAP Settings Tab

You should not have to make any changes to this section unless instructed to do so by your service provider. For more information see the online help by right-clicking on the Notification icon and selecting **Help**.

4.3 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 11. This enables you to configure the options for synchronizing any changes made to your Contacts in either Outlook or CommPortal.

Figure 11: Outlook Synchronization tab
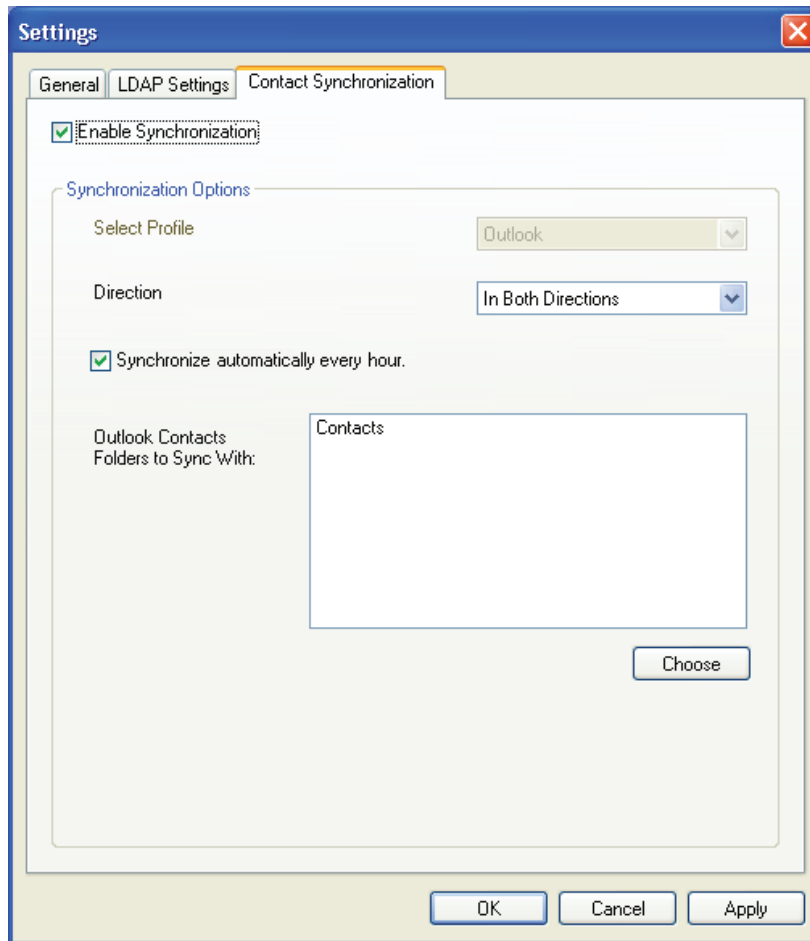
This tab has the following options:

- **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.

Note: 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.

4.4 Incoming Calls

You should use this tab to set whether CommPortal Assistant displays a pop-up when the telephone number you used to log into CommPortal Assistant rings. You can also enter up to five telephone numbers to which you can redirect these incoming calls using the pop-up.

Figure 12: Incoming Calls
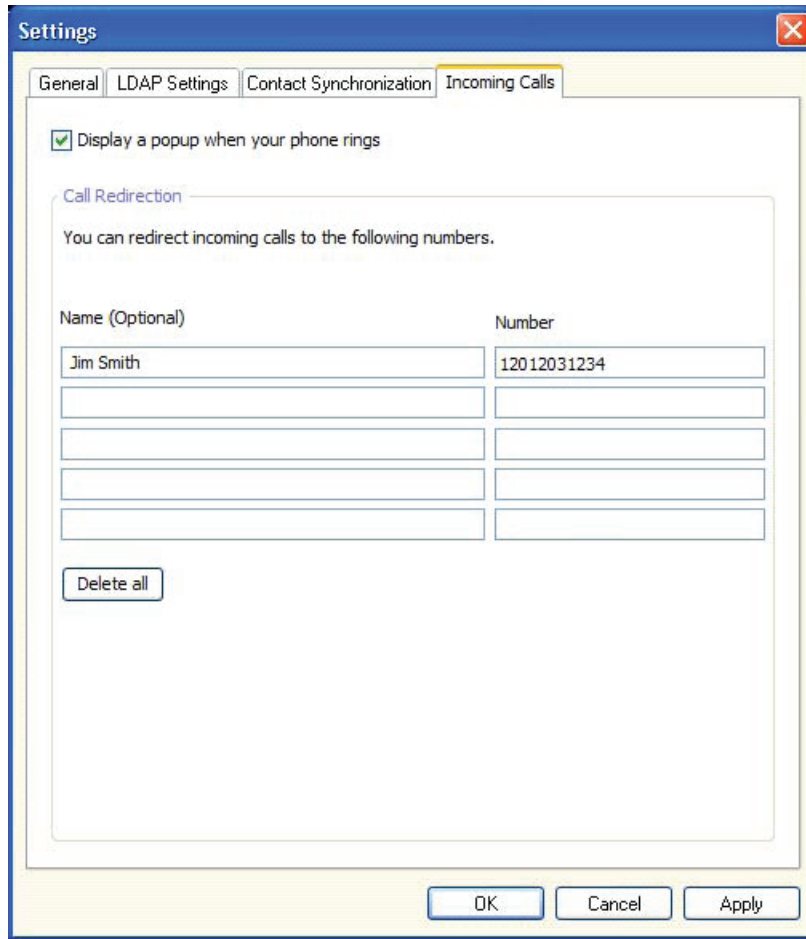
- This feature is enabled by default. If you choose to disable it by unchecking the box, the other controls on this tab will be grayed out.

- You may enter up to 32 characters in the **Name** field, or leave the field blank.

- You may enter any common number punctuation in the **Number** field including * and # to allow you to use Business Group short and intercom codes. The numbers can be in any form that would be valid to dial from the telephone, for example national numbers, local numbers, or extension codes.

- You cannot leave this field blank if you enter a value in the **Name** field.

- **Delete all** empties all the call redirection text fields.

- Once you have entered all the information, press **Apply** to save your changes but remain on this tab, or **OK** to save and close the **Settings** tab. You will see an error message if you have completed any of the fields incorrectly.

5.0 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.

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

- **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.

5.1 Incoming Call Pop-up

As described in section 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 13: 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:

    - 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

- indicates whether this is a Live Message Screening call.

Note: If you use Live Message Screening, as described in the **MetaSphere EAS User Guide**, you will see a pop-up for both stages of the LMS call—first for the original incoming call, and then for the subsequent LMS service call. You cannot use Call Redirection on LMS calls.

5.2 The Notification Icon

The Notification Icon indicates whether you have unheard messages, that you have 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.

- When you have unheard voicemails

- When you are connected to your account, but you have no unheard voicemails

- When there is an error connecting to your account

- When 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 14: Right-click menu of the Notification Icon
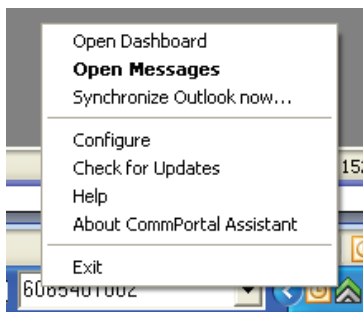
You can choose from the following options:
- **Open Dashboard:** opens CommPortal at the Dashboard display.

- **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**.

- **Configure:** opens the CommPortal Assistant settings page. For a full description, see section 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).

5.3 The CommPortal Assistant Toolbar

Note: 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 15: Setting your call services
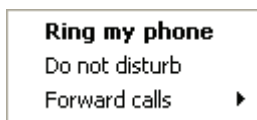
Changing your status

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 setting, 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.

Note: 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.

Making calls from CommPortal Assistant

Figure 16: Finding a contact to call
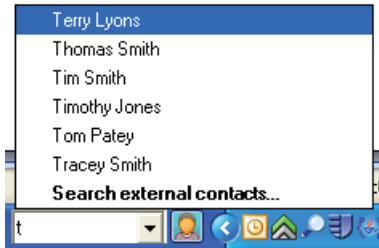
You can also use the toolbar to make an outgoing call. To start a call, begin typing in the text entry box inside the toolbar. As you type, the toolbar will automatically offer suggestions from your contact list.

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 2.1. Business Group Line contacts will be identified by an icon and will also show the Department (if this information is available).

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, their details are shown as illustrated in Figure 17. (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 17: Call Contact page

- Click Dial to initiate a call to this contact.

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

- You will see a pop-up that displays the status of the call for the first 15 seconds (unless your Service Provider has configured a longer timeout period), 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.

Note: Some models of phone, designed for use with a headset or speaker, support "auto-answer". If you are using one of these phones, you do not need to pick up your own phone. Through your headset or speaker, you will immediately hear the system placing your call to your chosen contact.

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