

CommPortal



QUICK START GUIDE

This guide helps you to get started with **CommPortal**. For more in-depth information, watch the tutorial videos at www.summit-com.com.

COMMPORTAL

CommPortal is the web portal used to configure the features on your new phone system. With CommPortal, you can:

- view missed calls and listen to voicemail messages
- manage your contacts
- set up rules to route your calls
- perform many other functions.

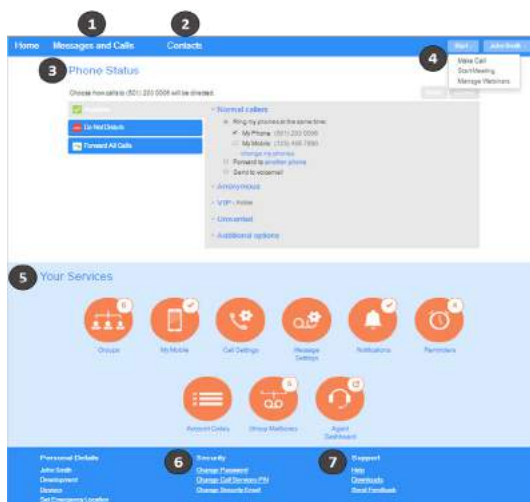
To get started, go to the login page at: www.summit-com.com.

Note: your administrator will provide a default password and, once you log in, you are prompted to create a new password.

COMMPORTAL HOME PAGE

Once you log in, you can see the CommPortal Home page.

You can view your Call Manager settings and access a range of other services on the CommPortal Home page.

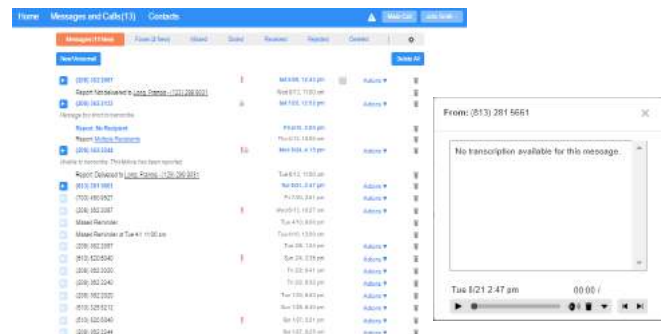


1. Messages and Calls – View and retrieve any voicemails
2. Contacts – Import your contacts from Outlook, create new contacts, or click on a name to dial.
3. Phone Status - Control your Call Manager settings.
4. Start - Select Make Call to make a call directly from CommPortal, Start Meeting to start a Meeting, or Manage Webinars to create a Webinar or manage your Webinars.

5. Your Services – Access a range of services available with your CommPortal account (for example, change your call, message and notification settings or set up a reminder call).
6. Security - Change your password or security email address.
7. Support - Select Downloads to download apps, for example MaX UC Client. Select Send Feedback to report bugs or make suggestions for improvements to the CommPortal interface.

MESSAGES AND CALLS

The Messages and Calls tab displays recent call activity. You can retrieve voicemails and view calls based on whether they were missed, received, dialed, or deleted.



Click on one of the sub-tabs for more details. From the Missed, Dialed, and Received tabs, you can click on a contact's name to call them, add them to your contacts, or jump to the caller's existing contact information.

Use the Actions drop-down alongside each message to Reply, Mark as heard, Forward as Email, or Forward as Voicemail. Click on the cross icon to delete the message.

CONTACTS

Use the Contacts tab to manage your contact information. You can create new contacts using recent call information (like a missed call), create contact groups, or import/export contacts.



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The fastest way to add your contacts is to import them from your email program. For Microsoft Outlook:

1. Open Outlook and go to the File tab.
2. Select Open & Export then Import/Export.
3. In the pop-up window, select Export to a file and click Next.
4. Select Comma Separated Values and click Next.
5. Select Contacts in the folder tree and click Next.
6. Save the exported file as Outlook Contacts in a place you can easily locate such as the Desktop or My Documents. Click Next.
7. On the CommPortal Contacts page, click Import. Select Choose file and select your Outlook Contacts file.
8. Click Import to import your contacts into CommPortal.

CALL MANAGER

In the center of the CommPortal Home page, the Phone Status panel displays your Call Manager, where you can set your availability and manage how incoming calls are routed to you.



If you are busy, you can change your status from Available to Do Not Disturb, which routes calls directly to voicemail. There is also a forwarding option that enables simultaneous ring with your mobile device.

The right-hand panel allows you to set up how calls from various different types of callers are handled. You can use the options on this screen to add numbers to VIP and Unwanted callers lists.

MAKE CALLS FROM COMMPORTAL

To make a call directly from CommPortal, click on the Start button and select Make Call. In the Dialer, enter the number you want to call (either by typing it in or selecting from the contact list dropdown) and choose which of your telephone numbers to use to make the call.

YOUR SERVICES

Select Call Settings to access your call settings. For example, you can withhold your caller ID and configure Call Forwarding, Call Blocking, or Call Jump settings.

Message Settings allows you to control how your messages are handled. You can set up message forwarding, manage your Mailbox Access, and customize how you are notified of a voicemail. Click on Voicemail Greeting to personalize your voicemail greeting with a recorded announcement (this requires a microphone).

CHANGE SETTINGS

The panel at the bottom of the CommPortal Home page allows you to make various changes to your settings.

- Under Personal Details, use the Devices link to configure your phone preferences. On the window that appears, use the set keys link to configure your phone preferences.
- Click on the Security links to change your password, PINs, or account email address.
- Under Support, use the Downloads link to access a range of apps that you can download onto your computer or mobile/tablet. This allows you to always have access to the key CommPortal features on your desktop or mobile device.

Message Settings



MORE QUESTIONS?

If you have any additional questions about **CommPortal**, call us at **(208) 237-4900** or email **service@summit-com.com**.