



POPP Hosted Microsoft VolP Phone System User Portal User Guide

This abbreviated user guide highlights some of the most common steps in the User Portal. For a more comprehensive manual for all aspects of the User Portal, refer to the User Portal Reference Manual.



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1 Logging In

- Go to: <u>http://portal.popp.com</u>
- Number: end user's 10-digit phone number
- Password:
 - First time login click [Reset Password] and follow the instructions sent via e-mail to establish your password. You will be prompted to enter an Account Email (password reset e-mail address) if you do not have one set. You may also opt to login using your e-mail address instead of your phone number.

Password Requirements:

- 8-20 characters and must include 1 number, 1 letter, and one special character
- Cannot contain the same character more than 2x in a row
- Cannot contain more than 2 characters in a sequence (e.g, 1234, or abcd)
- Cannot contain 4 or more digits of the phone number (e.g., if phone number ends in 7900, the password cannot contain "7900" anywhere in the password)

$_{\odot}$ Enter the password and click [Login]

| | Jser Portal |
|------------------|---------------------|
| СОМ | MUNICATIONS |
| CommPortal | |
| Please log in be | low. |
| Email / Number: | |
| Password: | |
| | Reset Password |
| Remember me | e on this computer. |
| | |

| Home Messages and Calls Contac | ts | | | | | Make Call | Showroom 4 - |
|------------------------------------------------------|-----------------------------|----------------------------------------|-------------------|-----------------------------------|--------------------|-----------|--------------|
| Phone Status | | | | | | | |
| Summary | | Forw | arding | | Screening | | |
| Calls that you receive will be pro | passed according to the f | | nfigured Services | | | | |
| All calls will ring your phone. | cost according to the h | showing fulcs. | | | | | |
| When busy, calls will be forward | ded to voicemail. 👔 | | | | | | |
| On no answer or when unavailable | able, calls will be forward | ed to voicemail. | | | | | |
| | | | | | | | |
| Your Services | | | | | | | |
| | 1 | ಿ | | 0 | | | |
| Groups | Call Settings | Message Settings | Notifications | Reminders | Agent Dashboard | | |
| Personal Details | Securi | ity | | Support | | | |
| Showroom 4 | | Password | | <u>Help</u> | | | |
| Sales Admin | | Call Services PIN e Account Email 🕜 | | <u>Downloads</u> Send Feedback | | | |
| <u>Devices</u> | | Voicemail PIN | | <u>controduction</u> | | | |
| | Generate | e Phone Onboarding (| <u>code</u> | | | | |



2 Change Settings

2.1 Change Password

- Under Security, click [Change Password]
- Click [change] next to Account Password

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|--------------------------------------------------------------|---------------------------------|----------------------------------------|---------------|----------------------------|--|
| Phone Statu | s | | | | |
| Sur | imary | Forw | arding | Screening | |
| Summary of Configure | d Services | | | | |
| Calls that you receive w | III be processed according to | the following rules | | | |
| * All calls will ring your | phone. | | | | |
| * When busy, calls will | be forwarded to voicemail. | 0 | | | |
| * On no answer or who | n unavailable, calls will be fo | rwarded to voicema | i. | | |
| | Call Settings | Message Settings | Notifications | Reminders | |
| Personal Details | Secu | | | Support | |
| Bryan P | | e Password | | | |
| Installation and Repair Admin | | e Call Services HIN e Volcemail PIN | | Downloads Send Feedback | |
| Devkes | Action of | | | - Contra Incontration | |

- Current Password: enter your current password
- New Password: enter your new password (must contain one letter, one number, and one special character)
- Confirm New Password: enter your new password
- Click [Confirm] to save

Change Password Current password: New password: Confirm new password: Confirm Cancel

2.2 Change Account Email

- Under Security, click [Configure Account Email]
- Email Address: enter the email address where an email should be sent if the user clicks the "Reset Password" link on the login screen.
- Allow email login: check this box to login using the email address instead of the phone number
- Click [Confirm] to save

2.3 Change Voicemail PIN

- Under Security, click [Change Voicemail PIN]
- In the Change PIN screen, enter the Current PIN (initial PIN provided by POPP), the New PIN, and Confirm the new PIN by entering it again
- · Click [Confirm] to save

| Configure Account En | nail |
|----------------------|---------------------------------------------------------------------|
| | used to reset the password or to log in stead of your phone number. |
| Email Address: | USER@popp.com |
| Allow email login: | |
| | Confirm Cancel |

| Change Voicemail PI | N | |
|---------------------|---------|--------|
| Current PIN: | •••• |] |
| New PIN: | | |
| Confirm new PIN: | |] |
| | Confirm | Cancel |



3 Click to Dial

 Click the [Make Call] button in the upper-right corner of the screen (button will show "Start" instead of "Make Call" if User has MaX Meeting)

| Home Messages and Calls | Contacts | Start • |
|-------------------------|----------|----------------------------|
| Phone Status | | Make Call Start Meeting |
| t. Available for Calls | - Andv | |

- Make a call to: enter the 10-digit phone number to call, type a name, or select from drop-down
- From: leave this field set to [My Phone] to call from your desk telephone or click [Change] and enter a [10-digit phone number] to place the call from (home phone, cell phone, etc.).
- Click [Dial] to initiate the call.
- The telephone you are calling from will ring (desk telephone, home phone, cell phone, etc.). Answer the telephone and the call will be placed to the destination phone number. Example: Use your home phone to make a call using your desk telephone phone number.

| Dialer | | |
|--------------------------|------|-------|
| Make a call to: | | • |
| From: My Phone Change | | |
| | Dial | Close |

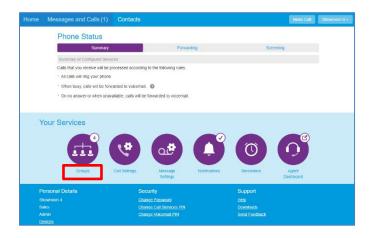


4 **Telephone Configuration**

• See Telephone Configuration user guides on popp.com/support > Portals

5 Log In/Out of a Multi Line Hunt Group (MLHG)

• Under Your Services, click on [Groups]



- Under Group Membership, click on the MLHG you wish to log in/out of
- Information for the group displays, including the total number of lines in the group, and your line's current status. To change status, select the [Login] or [Logout] link.

Note: Line must be enabled for Log In/Out by the business group administrator

| Messages and | Calls (1) | Contacts | | | | Make Cal | |
|-------------------------------------------------------------------------------|----------------------------------------------|--------------------|------------------------------------------------------------------------|--------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-----------------------------------------------|--|
| oups Call Settings | Message Settings | Notifications | Reminders | Agent Dashboard | | | |
| Groups | | | | | | | |
| Multi Line Hunt Grou | ps and Call Picku | p Groups you are a | a member of. For M | ulti Line Hunt Group | os, -⊡ indicates logger | d-in, and <_ logged-out. | |
| Multi Line Hunt Grou Group Membership | | p Groups you are a | a member of. For M Hunt Group. | | os, -ej indicates logger | d-m, and ∈j logged-out. | |
| | t 1 rvice - Premium H | | | lest 1 No nes: 4 Yo | | | |
| Group Membership 관 Hunt Group: ter 관 Hunt Group: Se | it 1 rvice - Premium H les - Basic HCC | | Hunt Group. Department: Number of Li | lest 1 No nes: 4 Yo | ne (Logged in: 4) u are currently logged | | |
| Group Membership - Hunt Group: te: - Hunt Group: Se - Hunt Group: Se | it 1 rvice - Premium H les - Basic HCC | | Hunt Group. Department: Number of Li Status: | lest 1 No No No No No No No No No No No No No | ne (Logged in: 4) u are currently logged gout Ext. | in to this Hunt Group | |
| Group Membership - Hunt Group: te: - Hunt Group: Se - Hunt Group: Se | it 1 rvice - Premium H les - Basic HCC | | Hunt Group. Department: Number of Li Status: | test 1 nes: 4 Yo Lo | ne (Logged in: 4) u are currently logged gout Ext. 1 7681 | In to this Hunt Group | |
| Group Membership - Hunt Group: te: - Hunt Group: Se - Hunt Group: Se | it 1 rvice - Premium H les - Basic HCC | | Hunt Group. Department: Number of Li Status: Position 1 | test 1 nes: 4 Yo Lo Number (763) 233 768 | ne (Logged in: 4) u are currently logged gout Ext. 1 7681 2 7682 | In to this Hunt Group Name - Showroom 1 | |



Message Settings

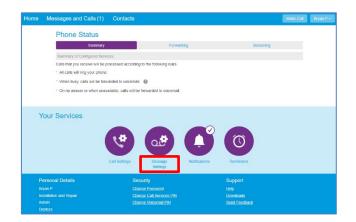
Forward messages as emails

Incoming calls are forwarded to voicemail after 20 seconds

General

6 E-mail Address (for Voicemail to E-mail and/or Fax to E-mail)

Click [Message Settings]



6.1 Delete E-mail Address

- Click [remove]
- · Click [Apply] to save

6.2 Edit E-mail Address:

- Click [edit]
- Enter e-mail address
- Click [Add]
- · Click [Apply] to save



| Message Settings | | | Apply | Cancel |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|------------|---------------------------------------|-------|--------|
| General Incoming calls are forwarded to voicemail after | seconds | | | |
| Forward messages as emails Forward to: systemdemo@popp.com edit remove add an email address Leave original in Inbox Mailbox Access | Voicemails | Email Address: systemdemo@popp.com | • | |
| ▹ Voicemail Greeting | | Add Ca | ncel | _ |

6.3 Add E-mail Address:

- Click [add an email address] (maximum 20 e-mails)
- Enter e-mail address
- Click [Add] to save
- Click [Apply] to save

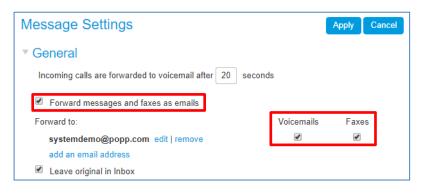
| | Incoming calls are forwarded to voicemail after 20 seconds Forward messages as emails Forward to: Voicemails systemdemo@popp.com edit remove add an email address Leave original in Inbox Email Address: | Message Settings | | Apply | Cancel |
|--------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|---------|-------|--------|
| Forward to: Voicemails systemdemo@popp.com edit remove @ add an email address @ Leave original in Inbox Email Address: | Forward to: Voicemails systemdemo@popp.com edit remove add an email address | | seconds | | |
| systemdemo@popp.com edit remove add an email address © Leave original in Inbox Email Address: | systemdemo@popp.com edit remove add an email address Ceave original in Inbox Mailbox Access Email Address: | Forward messages as emails | | | |
| Mailbox Access | ► Mailbox Access | systemdemo@popp.com edit remove add an email address | | | ٦ |
| Voicemail Greeting | | | | - | |

Apply Cancel



6.4 Forward Voicemails and/or Faxes to E-mail:

- Forward messages and faxes as emails: check the [Forward messages as emails] check box
- Click on the [Voicemails] or [Faxes] check box next to the desired e-mail
- Click [Apply] to save



6.5 Leave Original in Inbox:

- When box is checked, a copy of each voicemail and fax (if applicable) is saved in messages
 Note: Delete copies of faxes periodically to avoid exceeding the maximum number of messages.
- When box is not checked, voicemails and faxes are not saved in messages and are delivered via e-mail only

6.6 Include Action Links in Emails:

- If messages are forwarded as e-mails, check this box to enable links to the following options to appear within the e-mail notification:
 - Delete this message
 - o Mark this message as read
 - o Mark all messages as read
 - o Log in to your voicemail account

| Message Settings | _ | Apply Cancel |
|--------------------------------------------------------------------------------------|---------------|--------------|
| ▼ General | | |
| Incoming calls are forwarded to voicemail afte | er 20 seconds | |
| Forward to: | Voicemails | |
| systemdemo@popp.com edit remove add an email address Leave original in Inbox | 8 | |
| Mailbox Access | | |
| Voicemail Greeting | | |

| Forward messages and faxes as emails | | |
|--------------------------------------|------------|-------|
| Forward to: | Voicemails | Faxes |
| jmurphy@popp.com edit remove | | |
| add an email address | | |
| Leave original in Inbox | | |
| Include action links in emails | | |



7 Download Call Logs

- At the top of the screen click [Messages and Calls]
- Click [Missed]
- Click [Export]

| Messages | Faxes | Missed | Dialed | Received | Rejected | Deleted | 0 |
|----------|------------------|----------------|--------|----------|-------------------|---------|------------|
| | | | | | | | Export |
| PO | PP COM BUSI - | (612) 767 2929 | | Ň | Ved 6/20, 3:31 pm | | Show Rule |
| PO | PP COM BUSI - | (612) 767 2929 | | Ň | Ved 6/20, 3:05 pm | | Show Rule |
| Ма | in Number ICM - | (763) 233 7680 | | Ň | Ved 6/20, 3:00 pm | | Show Rule |
| Sho | owroom 3 - (763) | 233 7683 | | 1 | Ved 6/20, 2:59 pm | | Show Rule |
| PO | PP COM - (763) | 797 7900 | | F | ri 4/20, 11:31 am | | Show Rule |
| PO | PP COM - (763) | 797 7900 | | F | ri 4/20, 11:30 am | | Show Rule |
| 00 | DD 000 (700) | 707 7000 | | | - 400 44-00 | | Otraw Dula |

- Check/Uncheck the boxes next to [Received], [Missed],
 [Dialed], and [Rejected] so that only the Lists that you want to export are selected
- Click [Export] to download the .csv file

| Export Call Lists Select the call lists to export, and press Export. Lists to Export: Received Rejected Export status Export status Export cance | 000 00W (700) 707 7000 | | C-1.400 44-00 | |
|--------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|------------------------------------|---------------------|---------------|
| Lists to Export: | Export Ca | all Lists | | |
| Received Missed Dialed Rejected Export status | Select the call list | s to export, and pre | ss Export. | |
| Export status | Lists to Export: | | | |
| | Received | Missed | Dialed | Rejected |
| Export | Export status | | | |
| Export Cance | | | | |
| Export Cance | | | | |
| | | | | Export Cancel |
| Do you want to open or save callistdata.csv from portal.popp.com? | Do you want to open o | r save calllistdata.csv fro | om portal.popp.com? | × |
| Open Save Cancel | | | Open | Save Cancel |

 Click [Open] to view the call log file in MS Excel or [Save] to save

Note: For dialed calls, only records of the last 10 calls are available for export. For missed, received and rejected calls, records of the last 60 days of calls (up to a maximum of 500 calls across all types) are available for export.



Phone Status

Summary

8 Call Forwarding

View and Change Call Forwarding Settings

• Summary: View current settings

| Home | Messages and Calls Contacts | | Make Call Shownoom 2 |
|------|-------------------------------------------------------|------------------------|----------------------|
| | Phone Status | | |
| | Summary | Forwarding | Screening |
| | Summary of Configured Services | | |
| | Calls that you receive will be processed according to | o the following rules. | |
| | All calls will ring your phone. | | |
| | * When busy, calls will be forwarded to voicemail. | 0 | |
| | On no answer or when unavailable, calls will be for | orwarded to voicemail. | |

8.1 Forward All Calls

- Click [Forwarding]
- Check [Forward Calls Immediately] box
- Forward calls to: enter [10-digit phone number] to forward all calls to
- Ring my phone once when a call is forwarded: select [Yes] or [No]
- Click [Apply] to save

8.2 Forward Calls on No Answer or Busy

- Click [Busy/No Answer]
- To forward calls to the same phone number when you do not answer and when your line is busy:
 - Leave the [Use same call forwarding configuration for both services] box checked
 - Check the [Forward calls if you do not answer] box
- Forward calls
 Screening

 Numediate
 Selected Callers
 Forwarding Destinations

 Immediate
 Elevantic Answer
 Apply
 Cancel

 Immediate
 Elevantic Calls when no answer
 Forward calls when bosy
 Immediate
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 Immediate
 Forward calls if you do not answer
 Forward calls for
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 Forward calls for

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 Fo
- \circ Forward calls to: enter [10-digit phone number] to forward calls to if you do not answer or if your line is busy
- Forward unanswered call after: enter [# of seconds] you would like your line to ring before forwarding to the designated number (1 ring = approximately 6 seconds)

Note: Number of seconds must be fewer than the number of seconds before incoming calls are forwarded to voicemail (see Messages tab for number of seconds before incoming calls are forwarded to voicemail)

 $_{\odot}$ Click [Apply] to save



Make Call Shown

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- To forward calls when you do not answer:
 - Uncheck the [Use same call forwarding configuration for both services] box
 - Check the [Forward calls if you do not answer] box
 - Forward calls to: enter [10-digit phone number] to forward calls to if you do not answer

| | | Make Call |
|------------------------------------------------------------------------------------|-------------------------------------|-----------|
| Phone Status | | |
| Summary | Forwarding Screening | |
| Immediately Busy/No Answer Unavailable Select | ted Callers Forwarding Destinations | |
| Use same call forwarding configuration for both se Forward calls when no answer | Forward calls when busy | |
| Forward calls if you do not answer. | Forward calls if your line is busy. | |
| Forward calls to: | Forward calls to | |
| Forward calls to: 7635558478 | | |

Forward calls if your line is busy.
 Forward calls to:

ns tab to add numbers that you

7635558478 Hint: Use the Forwarding frequently forward calls to

 Forward unanswered call after: enter [# of seconds] you would like your line to ring before forwarding to the designated number (1 ring = approximately 6 seconds)

Note: Number of seconds must be fewer than the number of seconds before incoming calls are forwarded to voicemail (see Messages tab for number of seconds before incoming calls are forwarded to voicemail)

Messages and Calls

Phone Status

Busy/No Ans

E Forward calls if you do not answer

Use same call forwarding configuration for both services

- o Click [Apply] to save
- To forward calls when your line is busy:
 - Uncheck the [Use same call forwarding configuration for both services] box
 - Check the [Forward calls if your line is busy] box
 - Forward calls to: enter [10-digit phone number] to forward calls to if your line is busy
 - $_{\odot}$ Click [Apply] to save

For additional training and support:

• Visit www.popp.com or call POPP Communications at 763-797-7900