



# **POPP Hosted Microsoft VoIP Phone System User Portal Reference Manual**

This is a comprehensive manual for all aspects of the User Portal. For an abbreviated user guide highlighting some of the most common steps in the User Portal, refer to the User Portal User Guide.

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## 1 Introduction

This guide is intended to help Users perform the tasks needed to manage their phone settings via the User Portal, such as:

- View recent calls
- Listen to voicemails
- Manage contacts
- Set up rules to route calls
- And much more

The User Portal is supported on the latest versions of all major browsers and operating systems. This includes:

- Microsoft Internet Explorer version 6 or later
- Firefox version 3 or later
- Google Chrome version 4 or later (Windows only)
- Safari version 5 or later (Mac OS X only)

It is supported on the following operating systems:

- Microsoft Windows 2000
- Microsoft Windows XP
- Microsoft Windows Vista
- Microsoft Windows 7
- Mac OS X 10.6, Snow Leopard
- Mac OS X 10.7 (Lion)

Note: JavaScript must be enabled.

## 2 Logging In

- Go to <https://portal.popp.com>
- **Number:** enter 10-digit phone number (phone number must be set up by POPP with administrative access) or e-mail (if e-mail login is enabled)
- **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)

- Enter the password and click [Login]

- The **Home** screen will open

User Portal  
POPP  
COMMUNICATIONS

CommPortal Web

Please log in below.

Email / Number:

Password:

[Reset Password](#)

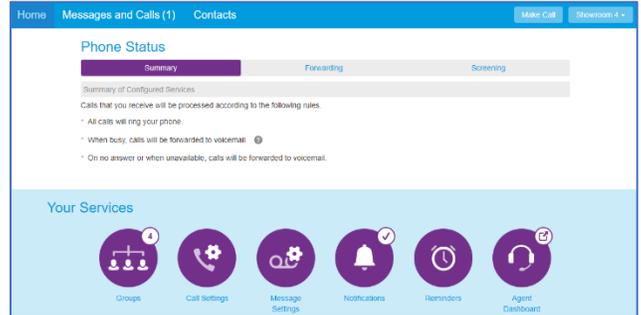
Remember me on this computer.

Login

### 3 Home Screen

The Home page provides a way to quickly access some of your key features including:

- **Summary:** Displays current settings for how incoming calls are handled. Click on the **Forwarding** tab to manage your forwarding.
- **Messages and Calls:** Shows at a glance how many new messages you have. Click on the **Messages and Calls** tab to manage your messages.
- **Contacts:** Click on this tab to view/manage contacts



- **Help Information:** Click the **Help** menu option (under Support) at the bottom of the screen to access help information



- **To Logout:** In the top-right corner of the screen, click on the name of your User and select **Logout**

## 4 Click-to-Dial

The **Click to Dial** feature allows you to initiate a phone call by clicking on a phone number, contact name, or by clicking the Make Call [Make Call](#) button (button will show “Start” instead of “Make Call” if User has MaX Meeting).

Click to Dial allows you to select the phone number that you want to place the call from. This can be your desk telephone, cell phone, home phone, etc.:

- If you select your desk telephone: The system will automatically answer your desk phone and launch the call (Your line must be set to “Auto-answer my phone for click-to-dial calls”)
- If you select your cell phone, home phone, etc.: Your telephone will ring and you must answer your telephone in order to place the call to the destination number

**Note:** Your desk telephone phone number will be sent for outbound caller ID even when the call is placed from another telephone (cell phone, home phone, etc.)

To place a Click to Dial call using the [Make Call](#) button:

- Click on the [Make Call](#) button
- **Make a call to:** Type the 10-digit phone number or select from the drop-down list
- **From:** Click **Change** to change the number that you are calling from. This is the telephone that will ring and you will need to answer in order to place the call to the destination number.
- Click **Dial** to initiate the call
- The call will ring on your desk phone or other phone you indicated to place the call **From**. **Answer this call** to place the call to the destination phone number.

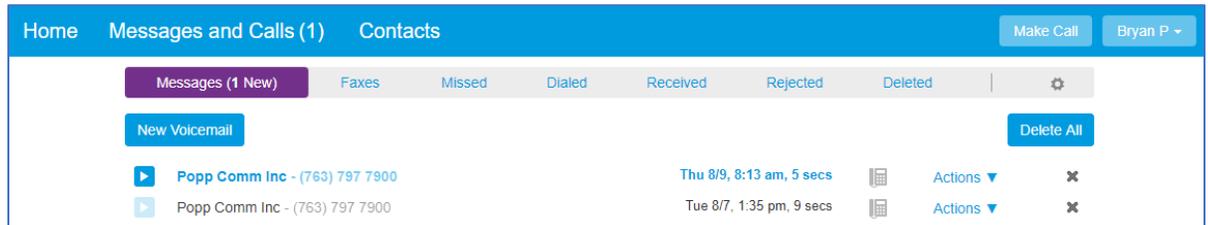
The screenshot shows a web interface titled "Dialer". It has a section "Make a call to:" with a dropdown menu currently displaying "7637977900". Below this is a "From:" section with several options: "My Phone" with a "Change" link, "My Phone (763) 233 7684", "Other (612) 236 6203", and "new number...". At the bottom right of the interface are two buttons: "Dial" and "Close".

**Note:** You can also initiate a click to dial call by clicking on a phone number or contact name and selecting to **Dial from (nnn) nnn-nnnn** or **Dial from other number** option.

A popup shows the progress of these stages and the duration of the call once the destination telephone has been answered. If you pick up your telephone, but there is a problem calling the target telephone, the web page will not report the problem since you will hear the problem via the telephone itself. This matches the behavior you would expect had you picked up the telephone yourself and dialed manually. You can end the call via your telephone by hanging up, or by pressing the **End Call** button in the popup window. You can hide the popup window without ending the call by clicking on the **Close** button.

## 5 Messages and Calls

The **Messages and Calls** screen allows you to listen to your voicemails, manage your faxes, and view details of your recent missed, dialed, received, and rejected calls and deleted messages.



The Messages and Calls screen contains the following tabs:

- **Messages:** Lists new and saved voicemail messages. Each mailbox can store up to 200 messages or up to 100MB of data.
- **Faxes:** Lists new and saved faxes (Deskphone User and Fax to E-mail required)
- **Missed:** Lists unanswered incoming calls (up to 500 calls in the last 60 days)
- **Dialed:** Lists outgoing calls, including calls made using the Click to Dial feature (up to 500 calls in the last 60 days)
- **Received:** Lists calls that you have answered (up to 500 calls in the last 60 days)
- **Deleted:** Lists deleted voicemail messages. You can select to restore or permanently delete them.

### 5.1 Messages

The **Messages** tab lists all of the voicemail messages in your inbox. New messages (those you have not yet listened to) appear in **bold**.

For each message you can see who the caller was, the time of the call, and the length of the message. If the call was from a phone number that appears in your contact list or the caller's name was provided, then the name of the caller will be displayed. If the call was from a phone number that is not in your contact list, the caller's phone number will be displayed. You can also see if the caller marked the message as 🚨 Urgent or 🗝 Private.

Your inbox may also contain special System Messages, such as delivery failure notifications.

The following options are available in this tab:

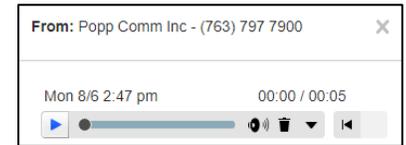
- **Play:** Click the **play**  icon to open the voicemail player
- **Click-to-dial:** Click on the caller's name/number and select **Dial** to click-to dial this number
- **Add to/View contacts:** Click on the caller's name/number and select **add to contacts** (if not in contacts) or **view contact**
- **Actions drop-down list:**
  - **Reply:** Select this option to record a reply message
  - **Mark as heard/new:** Select this option to mark a message as **new** (bold) or **heard** (non-bolded)
  - **Forward as Email:** Select this option to forward a message as an e-mail attachment
  - **Forward as Voicemail:** Select this option to forward a message as a voicemail to another subscriber
- **Save a copy:** Right-click on a message and select **Save as...** to save it on your computer
- **Delete:** Click the **delete** icon  to delete the message

#### Phone Access

To access your voicemail from any phone, dial **651-789-7688**.

## 5.2 Voicemail Player

When you click the **Play** icon  on the Messages and Calls screen, the **Voicemail Player** screen will open. The top section of the player screen shows the name (if available) and phone number of the person who left the voicemail.



The lower section of the player screen displays more information about the message, including the date and time the message was received. You can also see if the caller marked the message as  Urgent or  Private, or has requested a read receipt .

The buttons along the bottom of the player allow you to play and manage your messages:

-  **Play** the message
-  **Pause** the message (replaces Play while a message is playing)
-  **Progress** of message playback and can be dragged along the bar  to skip to a particular part of the message
-  **Volume** of message playback. Click the icon and use the  slider to change the volume level.
-  **Delete** the current message
-  **Options** drop-down list:
  - **Reply** - Select this option to record a reply message:
    - **To:** This field is auto-populated with the User who left the message
    - **Record Message:** Record a message to be played before the voicemail (if desired)
    - **Check the Urgent or Private** check box(es) to flag the message as urgent or private (if desired)
    - **Original Voicemail:** Play the original message (if desired)
    - **Add recipients** to the **To** field, separating them with semicolons
    - Click **Send**
  - **Mark as heard/new:** Select this option to mark a message as **new** (bold) or **heard** (non-bolded)
  - **Forward as Email** - Select this option to forward a message as a WAV file e-mail attachment (as long the message is not marked as  private):
    - **Add recipients** to the **To, Cc, and Bcc** fields, separating them with semicolons
    - **Enter a message** in the text box to be sent in the body of the e-mail
    - Click **Send**

**Note:** When forwarding a message as an e-mail, the From address specified will include your name as displayed on the settings page.
  - **Forward as Voicemail** - Select this option to forward a message as a voicemail to another User in your business group (as long the message is not marked as  private):
    - **To:** Select a User in your business group from the drop-down list
    - **Record Introduction:** Record an introductory message to be played before the voicemail (if desired)
    - **Check the Urgent or Private** check box(es) to flag the message as urgent or private (if desired)
    - **Original Voicemail:** Play the original message (if desired)
    - Click **Send**
  - **Save:** Allows you to save the message locally on your computer
  - **Timer:** Indicates both the playback time (on the left) and the total length of the message (on the right)
-  **Skip back** to play the previous message
-  **Skip forward** to play the next message
- To close the voicemail player and return to the Messages & Calls screen, click 

### 5.3 New Voicemail

This feature enables you to leave voicemails for other people who use this voicemail system by recording and sending a message through the Portal interface rather than calling them. You can record a single message to be sent to a single User, or sent to multiple Users rather than calling them each individually.

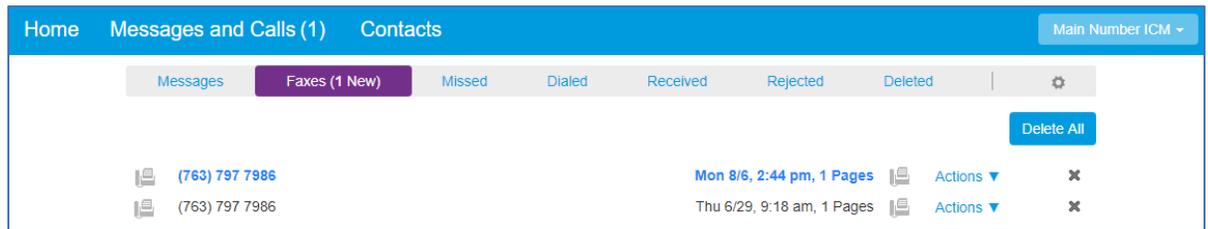
To record a new Voicemail:

- From the Messages and Calls screen, click **New Voicemail**
  - **To:** Select a User in your business group from the drop-down list
  - Check the **Urgent** or **Private** check box(es) to flag the message as urgent or private (if desired)
  - **Record Message** using the following buttons:
    -  Record. This will overwrite a previously recorded message.
    -  Stop recording
    -  Play back your recorded message. This action will be unavailable if you have not yet recorded a message.
    -  Stop playing the message
    -  Adjust the gain of your microphone. Click and then adjust the slider  to set the required volume level.  
While recording, the  lights above this control will show how loud the signal is from your microphone. If the gain is set correctly then several green lights should appear while you are recording. If only one or two appear, then the gain is set too low and your message will be too quiet. If red lights appear then the gain is set too high and your message will be distorted.
    -  Adjust the playback volume. Click and then adjust the slider  to set the required volume level.
    -  View and change your Adobe Flash Player Settings, for example to adjust the settings for your microphone

When you first attempt to record a message, an **Adobe Flash Player Settings** screen will appear. Ensure that the **Allow** radio button is selected, and if you do not wish to be shown these settings in future check the **Remember** checkbox.

## 5.4 Faxes

The **Faxes** tab lists all of the faxes in your inbox. New faxes (you have not viewed yet) appear in **bold**.



For each fax in your inbox, you can see who sent the message, when the message was received, and how many pages the message contains. If the fax has been sent from a phone number that appears in your contact list or the sender's name was provided, then the name of the sender will be displayed. If the fax was from a phone number that is not in your contact list, the phone number that the fax was sent from will be displayed.

Your inbox may also contain special System Messages, such as delivery failure notifications.

The following actions are available to you on this tab.

- View a fax or save a local copy on your computer
- Manage your faxes by deleting them, or marking them as either new or read
- Forward a fax
- View contact details or add new callers to your contact list.

### View or save a fax

- To read a fax, click on the icon corresponding to the fax you wish to view.
- To save a local copy of a fax on your computer, right click on the  or  icon, and select Save Target As... or Save Link As...
- To download a free PDF reader, click [here](#).

### Manage your faxes

- **To delete a fax**, press  in the row corresponding to the fax that you want to erase. **To delete all faxes**, click .
- Faxes are automatically marked as read to when you view them. **To mark a fax, you have previously read as new** (so that it appears in bold again), click the  icon in the row corresponding to that fax and select **Mark as new** in the dropdown list that appears.
- Similarly, **to mark a fax as read** without viewing it, click the  icon in the row corresponding to that fax and select **Mark as read** in the dropdown list that appears.

### Forward a fax

You can forward a fax as an email to one or more email addresses (the fax will be attached to the email as a PDF file). Alternatively, if you wish to forward a fax to another User (or Users) on the same messaging system, you can forward the message as a fax so that it appears in their fax inbox.

### To forward a fax as an email:

- Click the  icon corresponding to the message you wish to forward, and select Forward as Email to bring up the Forward as Email screen.

- Enter one or more recipients in the To field. If the recipient is configured in your contact list, then you can identify them by name. Otherwise you must enter their complete email address. You can specify multiple recipients by separating them with semicolons.
- The Forward as Email screen also allows you to optionally
  - specify additional recipients in the Cc or Bcc fields
  - adjust the subject line of the email message
  - add text to be included along with the fax attachment.
- When you are done, click **Send** to send the message.

Note: when forwarding a message as an email, the From address specified will include your name as configured on the settings page.

#### To forward a fax to one or more other Users on the same messaging system:

- Click the ▼ icon corresponding to the fax you wish to forward, and select Forward as Fax to bring up the Forward as Fax screen.
- Enter one or more recipients in the To field. The recipients specified must be other Users on the same messaging system, or the attempt to send the message will fail. If a recipient is configured in your contact list, then you can identify them by name, otherwise you must enter their fax number directly. You can specify multiple recipients by separating them with semicolons.
- You can optionally flag the fax as Urgent.
- When you are done, click **Send** to send the fax.

#### View contact details or add new callers to your contact list

- If a fax has been sent from a phone number that appears in your contact list, then the name of the sender will be displayed. To view your contact list entry for the sender, click on their name and select **View contact**.
- If a fax has not been sent from a phone number that appears in your contact list, the phone number that the fax was sent from will be displayed. In this case, you can create a contact list entry for the sender by clicking on their number, and selecting **Add to contacts**.

## 5.5 System Messages

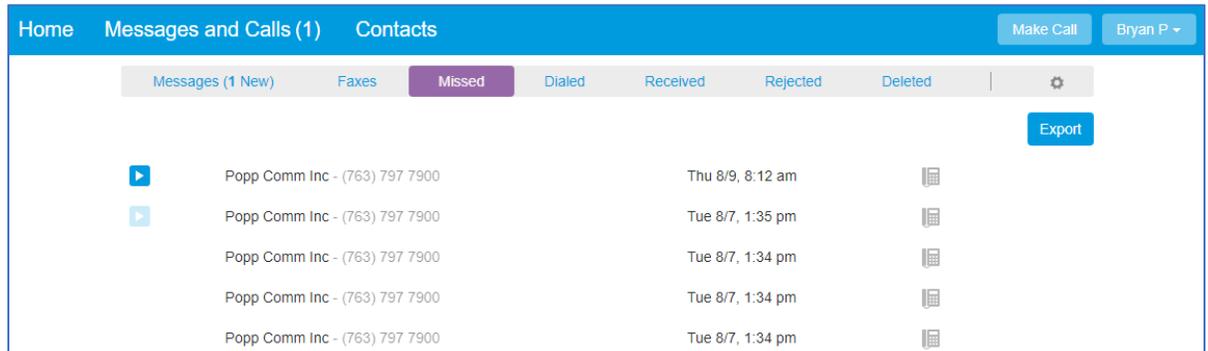
Special System Messages may appear in your mailbox to indicate one of the following:

- If you have sent or forwarded a message via the telephone interface and requested a read or delivery report (receipt), the report will appear in your mailbox once the message has been read or delivered.
- If you have sent or forwarded a message and the system has been unable to deliver it, or the message delivery has been delayed, a report will appear in your mailbox once the message has been deemed undeliverable or once delivery has been delayed.
- If you have failed to answer a scheduled reminder call, you will receive a message in your mailbox to notify you that you have missed the reminder.

Some system messages may have voicemails or video voicemails associated with them. If there is an associated message then a  or  icon will appear - click on the icon to hear the message.

## 5.6 Missed Calls

The **Missed Calls** tab lists your recent missed calls.



The following actions are available on this tab:

- **Click-to-dial:** Click on the caller's name/number and select **Dial** to click-to dial this number
- **Add to contacts:** To add an unrecognized caller to your contact list, click on their number and select **Add to contacts**
- **View Contact:** To go to a contact's entry in your contact list, click on their name and select **View contact**
- **Show Rule:** To go to the rule which handled a call, click on **Show Rule** (if applicable)

The following information is displayed for each missed call:

- **Message icon** - If the missed call resulted in a voicemail, one of the following icons will be displayed:
  - You have an unheard message as a result of this call.
  - You have already heard the message resulting from this call.
  - A message was left, but it is no longer in your inbox.
- **Caller details** - Each caller is identified in the following ways:
  - **Name:** The caller's name displays if it was provided or if the phone number matches an entry in your contact list
  - **Telephone type:** Accompanies the name when the phone number matches an entry in your contact list (e.g., Work)
  - **Phone number:** Displays if the number of the caller does not match an entry in your contact list
  - **Unknown:** Displays if the caller withheld their identity and no information is available
- **Date and time** of the call

## 5.7 Dialed Calls

The **Dialed** tab lists your recent dialed calls.

Caller Information	Call Duration
(651) 789 7677	Tue 8/7, 1:39 pm, 16 secs
(651) 789 7677	Tue 8/7, 9:45 am, 27 secs
(763) 512 1111	Tue 8/7, 9:44 am, 14 secs

The following actions are available on this tab:

- **Click-to-dial:** Click on the caller's name/number and select **Dial** to click-to dial this number
- **Add to contacts:** To add an unrecognized caller to your contact list, click on their number and select **Add to contacts**
- **View Contact:** To go to a contact's entry in your contact list, click on their name and select **View contact**

The following information is displayed for each dialed call:

- **Caller details** - Each caller is identified in the following ways:
  - **Name:** The caller's name displays if it was provided or if the phone number matches an entry in your contact list
  - **Telephone type:** Accompanies the name when the phone number matches an entry in your contact list (e.g., Work)
  - **Phone number:** Displays if the number of the caller does not match an entry in your contact list
- **Date and time of the call**
- **Call duration in hours, minutes, and seconds**

## 5.8 Received Calls

The **Dialed** tab lists your recent dialed calls.

Caller Information	Call Duration	Rule Icon
Main Number ICM (Work) - (763) 233 7680	Wed 8/1, 9:36 am, 27 secs	[Icon]
Main Number ICM (Work) - (763) 233 7680	Wed 8/1, 9:35 am, 13 secs	[Icon]
VOP (Work) - (763) 233 7690	Tue 7/31, 1:56 pm, 33 secs	[Icon]
VOP (Work) - (763) 233 7690	Tue 7/31, 1:47 pm, 19 secs	[Icon]

The following actions are available on this tab:

- **Click-to-dial:** Click on the caller's name/number and select **Dial** to click-to dial this number
- **Add to contacts:** To add an unrecognized caller to your contact list, click on their number and select **Add to contacts**
- **View Contact:** To go to a contact's entry in your contact list, click on their name and select **View contact**
- **Show Rule:** The Set of Rules which handled the call. To see which number a call was terminated to, hover the cursor over the rule name.

The following information is displayed for each received call:

- **Caller details** - Each caller is identified in the following ways:
  - **Name:** The caller's name displays if it was provided or if the phone number matches an entry in your contact list
  - **Telephone type:** Accompanies the name when the phone number matches an entry in your contact list (e.g., Work)
  - **Phone number:** Displays if the number of the caller does not match an entry in your contact list
  - **Unknown:** Displays if the caller withheld their identity and no information is available
- **Date and time of the call**
- **Call duration** in hours, minutes, and seconds

## 5.9 Rejected Calls

The **Rejected** tab lists your recent dialed calls.

The following actions are available to you on this tab.

- **Click-to-dial:** Click on the caller's name/number and select **Dial** to click-to dial this number
- **Add to contacts:** To add an unrecognized caller to your contact list, click on their number and select **Add to contacts**
- **View Contact:** To go to a contact's entry in your contact list, click on their name and select **View contact**
- **Show Rule:** The Set of Rules which handled the call. To see which number a call was terminated to, hover the cursor over the rule name.

The following information is displayed for each rejected call.

- **Caller details** - Each caller is identified in the following ways:
  - **Name:** The caller's name displays if it was provided or if the phone number matches an entry in your contact list
  - **Telephone type:** Accompanies the name when the phone number matches an entry in your contact list (e.g., Work)
  - **Phone number:** Displays if the number of the caller does not match an entry in your contact list
  - **Unknown:** Displays if the caller withheld their identity and no information is available
- **Date and time** of the call
- **Call duration** in hours, minutes, and seconds

## 5.10 Deleted Messages

The **Deleted** tab lists your recently deleted messages/faxes.



For each message or fax in your deleted items tab, you can see who the caller was, the time of the call, and the length of the message. If the call or fax was from a phone number that appears in your contact list or the caller's name was provided, then the name of the caller will be displayed. If the call or fax was from a phone number that does not appear in your contact list, the phone number will be displayed. You can also see if the caller marked the message as 📞 Urgent or 🔑 Private.

The following actions are available to you on this tab:

- **Play a voicemail message:** Click on the **Play** icon to open the Voicemail Player and play the message
- **View a fax:** Click on the **fax** you wish to view
- **Click-to-dial:** Click on the caller's name/number and select **Dial** to click-to dial this number
- **Add to contacts:** To add an unrecognized caller to your contact list, click on their number and select **Add to contacts**
- **View Contact:** To go to a contact's entry in your contact list, click on their name and select **View contact**
- **Restore a message/fax:** Click on the **Actions** drop-down to the right of the message and select **Restore**. The message/fax will be moved to the Messages tab.
- **Delete Permanently:** Click on the **Actions** drop-down to the right of the message and select **Delete Permanently**

## 5.11 Troubleshooting

***I have a  warning indicator that says Flash is Not Installed, and clicking on the  or  icon does not bring up the Player.***

The Voicemail Player uses a technology called Flash from Adobe, which is not installed on your computer. If you click on the  warning indicator then it will give you a link to Adobe's website that will install Flash for you.

***I have recorded my message, but when I try to play it back, I cannot hear anything***

- Check you have actually recorded something. The length of the current recording is shown as e.g. 0:01:35 (1 minute and 35 seconds). If the current recording length is 0 or much lower than expected then try recording your message again.
- Check that playback volume is turned up high enough. Volume can be adjusted using the volume slider described above.
- Try re-recording the message, and as you are recording, watch the  lights on the player.
  - If no lights appear, or only one or two appear, then check the following:
    - Increase the gain of your microphone by clicking  and moving the gain control  nearer to the top end
    - Click the  icon to bring up the Adobe Flash Player Settings and make sure that the Enable hardware acceleration option is selected. Click on the microphone icon at the bottom of this settings box and check that the correct microphone is selected in the dropdown, and that the record volume is turned up.
- If you are using an external microphone, check that this is plugged in correctly. If this still doesn't solve the problem, then it may be that your microphone has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.
- If several green lights appear consistently while recording your message, then it is likely that your message has recorded correctly and the problem is occurring when playing it back. If you are using external speakers, check that these are plugged in correctly and turned on. If this does not resolve the problem, then it may be that your speaker has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.

***I have recorded my message, but when I try to play it back it is distorted***

- This may be because your microphone gain is set too high. Reduce the gain by clicking  and moving the gain control  nearer to the bottom.

### **Mailbox quota**

You have restrictions on the total amount of content that can be stored in your mailbox. If you reach this limit, or are close to reaching this limit, you will see a  warning icon appear on this page. Clicking on this warning icon will tell you how much content you have store along with the storage limit.

If you are close to reaching your limit, then you may wish to delete some of your messages and faxes to free up space. If you reach your limit and don't delete any content, you will be unable to receive further messages in your mailbox.

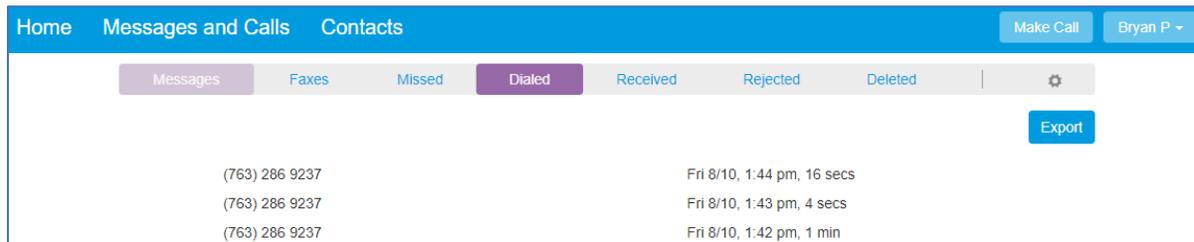
In addition to voicemail and fax content you may be told that you have other content:

- This will usually be because you have accessed your mailbox using a remote email client (such as Microsoft Outlook) over IMAP and accidentally moved, for example, emails into your mailbox. Such content will take up space in your mailbox, but you will be unable to access it through the Web UI - you will need to use your remote email client again to remove it.
- Voicemails, video voicemails and faxes in your secondary group mailboxes are included in your quota. You may need to log in to your secondary mailboxes and delete some of the content from them to free up space.
- You may need to permanently delete some of the deleted messages and faxes in the **Deleted** tab in order to reduce the size of your mailbox
- If you have accessed your mailbox using a remote email client (such as Microsoft Outlook) over IMAP and accidentally moved, for example, e-mails into your mailbox, such content will take up space in your mailbox.

However, you will be unable to access it through the Portal interface. You will need to use your remote e-mail client again to remove it.

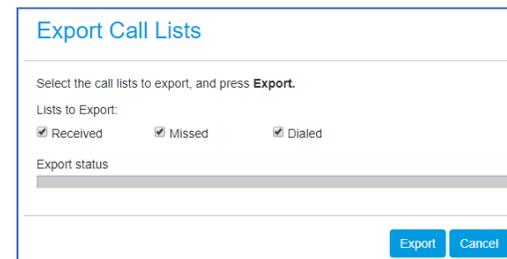
## 5.12 Export Calls

This feature allows you to export lists of your missed, dialed, received, and rejected and received calls as a text file in CSV format. This file can then be stored locally, and accessed using a range of other applications such as text editors or spreadsheets. If you run a business, you might for example use the data in this file to help you track the calls you have made and received for individual client accounts.



To export a list of your calls:

- Click on the **Messages and Calls** tab
- Click on the **Missed, Dialed, Received, or Rejected** call tab
- Click on the **Export** button to open the **Export Call Lists** screen
- Select the call lists you wish to export: Check the box(es) for Received, Missed, Dialed, and/or Rejected calls, and then click on the **Export** button to begin the export
- Once the export operation has completed, you will have the opportunity to specify where you wish to save the exported file



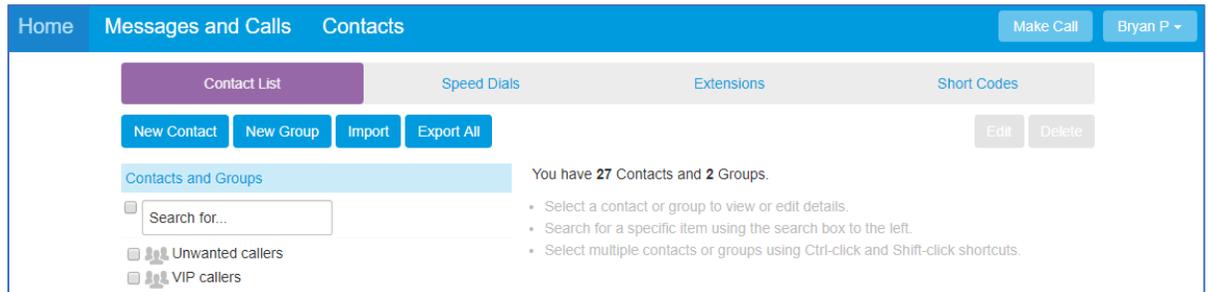
For dialed calls only, records of the last 10 calls are available for export. For missed, received and rejected calls records of the last 60 days of calls (up to a maximum of 500 calls across all types) are available for export.

Here is the info that shows up on the Exported calls report:

- Date
- Time
- Call Type - Missed, Dialed, Received, or Rejected
- Calling Number
- Calling Name
- Calling Phone Type – work, home, cell, etc. from Contacts
- Terminating Number – N/A, blank
- Called Number
- Called Name – name from Contacts
- Called Phone Type– work, home, cell, etc. from Contacts
- Duration
- Call Manager Rules Name

## 6 Contacts

The **Contacts** tab allows you to manage your Contact List and also displays your Extensions and Short Codes.

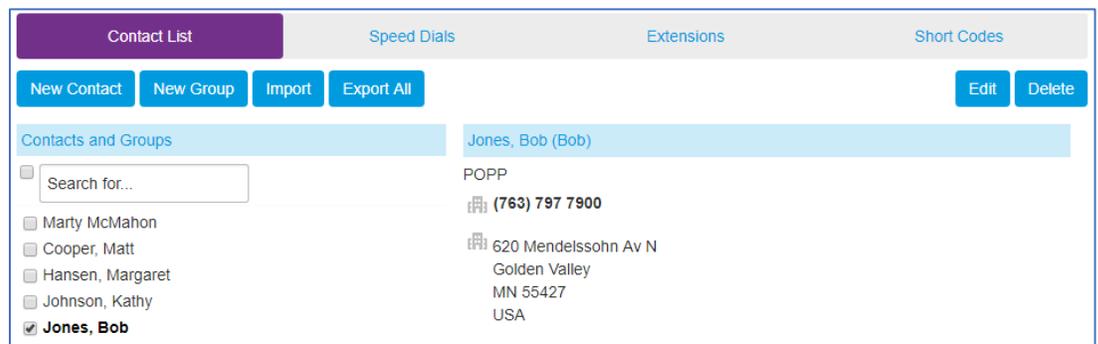


### 6.1 Contact List

The **Contact List** allows you to store information about your contacts. Adding your contacts to this list makes other features easier to use.

For Example:

- Caller's name will be displayed in Call History in place of the phone number
- Select contacts from your contact list when configuring features such as call rejection instead of entering the phone number



Each contact list entry may contain:

- First Name
- Last Name
- Nickname
- Job Title
- Organization
- Home, Mobile, Fax, and Other phone numbers
- E-mail Addresses (2)
- SMS Address
- Home and Work Address

When multiple phone numbers are configured, one number can be identified as the main (or default) number. Similarly, one of the e-mail addresses can be marked as the main (or default) e-mails.

Your contact list may also contain groups, which make it easy to group together individual contacts. Groups may also be nested within other groups.

Viewing the details of a group allows you to see group member names and viewing details of a contact allows you to see which groups the contact is belongs to.

The **Contact List** consists of two columns:

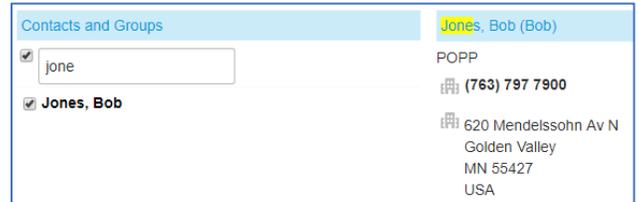
- **Contacts and Groups** column: Lists your contacts and groups in alphabetical order and is used to add a New Contact, New Group, Import or Export contacts.
- **Details:** Displays details of a selected contact/group and is also used to Edit or Delete existing contacts or groups.

## Finding a Contact List Entry

There are multiple ways to finding an existing contact list entry:

- **Alphabetically by name:** Scroll through the names in the contact list column. **Click on the name** of the contact or check the box next to the contact's name in order to view it.
- **Search by name:** To search by name type the first few letters of any part of the name into the **Search for...** box at the top of the contact list column. Matching proceeds as you type, and the more you type, the more constrained the list of matches will be. Matching is performed against contacts' first and last names, and also against various other text fields within the contact. Click on the matching contact to view details on the right side of the screen.
- **Search by number:** To search for a contact by number type the first few digits of one of their phone numbers into the search box. Click on the matching contact to view details on the right side of the screen.

Within the Details column, the matching search text will be highlighted for quick recognition.



## Selecting Multiple Contact List Entries

To select multiple contact list entries at once:

- Check the box to the left of the contact name to select it. Uncheck the box to deselect it.
- Click on the contact list entry while holding the Shift key. This will select all items between the currently displayed entry and the entry that was clicked.
- Click on the check box beside the Search for... box to select all contacts. If all items are already selected, unchecking this check box will deselect all items.

When you have more than one item selected, you'll be able to view the number of selected contacts and groups, but no contact details.

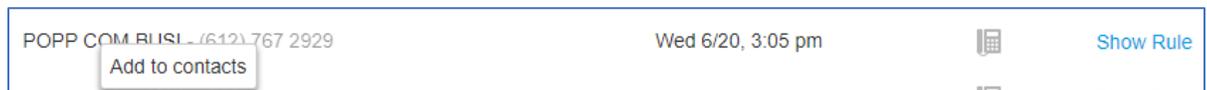
## 6.2 Add a New Contact

### To add a new contact:

- From the **Contacts** tab, click on the **New Contact** button
- **Enter information in the contact fields**
- **Enter 10-digit telephone numbers** with or without dashes. The format of the 10-digit phone number will be changed to (nnn) nnn-nnnn upon saving.
- Click **Save** to save or **Cancel** to discard changes

### To add a new contact entry from another Portal screen:

When you receive a call from someone who is not already recognized as a contact, you can click on the phone number and select the option **Add to contacts** to open the **New Contact** display, where you can easily fill in any additional information about the contact and click **Save** to save the entry to your contacts.



## 6.3 Edit an Existing Contact

To edit an existing contact:

- From the **Contacts** tab, check the box to the left of the contact you wish to edit
- **Note:** You will not be able to view or edit contact details if you have more than one contact selected.
- Click the **Edit** button on the right side of the screen above the contact details
- **Make the necessary updates to the field entries**
- Click **Save** to save changes or **Cancel** to cancel changes

**Note:** When editing a contact, you can also change which group(s) it is a member of.

## 6.4 Add a Group Entry

To add a new group to the contact list:

- From the **Contacts** tab, click on the **New Group** button
- **Group Name:** Enter a name for this group
- **Telephone ID:** Enter a numerical ID used to refer to the group
- **Select individual contacts and groups** to be added as group members by checking the box to the left of their names in the Group Members column. This column also holds a search box which can be used to quickly locate the names you want if you already have a long contact list.
- Once you have finished entering the details for the new group and selecting its members, click the **Save** to save the group or **Cancel** to cancel.

The new group will appear in the Contact List on the left side of the screen.

## 6.5 Edit a Group Entry

To edit an existing group:

- From the **Contacts** tab, **check the box** to the left of the group you wish to edit  
**Note:** You will not be able to view or edit contact details if you have more than one contact selected.
- Click the **Edit** button above the contact details
- **Make the necessary updates to the field entries**
- Click **Save** to save changes or **Cancel** to cancel changes

## 6.6 Delete a Contact

To delete contact list entries:

- From the **Contacts** tab, **select the entries** you wish to delete
- Click on the **Delete** button above the contact details. A confirmation popup will appear showing the number of contacts or groups you're trying to delete or the name of the contact or groups if you're deleting only one entry.
- Click **Delete** to delete or **Cancel** to cancel

## 6.7 Contact List Import

This feature allows you to import contacts from another application such as Microsoft Outlook or Outlook Express. Contact List Import is a quick way to populating your contact list with the contacts that are already defined in another application. If you maintain multiple contact lists then this feature can also be used to periodically update your contact list with the changes you have made to contacts in other applications.

To import contacts, you must first generate a CSV file containing them. This file is typically generated by exporting your contacts from another application. For example, the following steps describe how you would export your contacts from Microsoft Outlook. Note: The steps may vary slightly depending upon the version of Outlook you are using. You may be able to import contacts from other programs, but Outlook is the only supported program.

### To export Outlook contacts to a CSV file:

- Click on the **File** tab
- Click on **Options**
- Click on **Advanced**
- Under the Export header, click the **Export** button
- Choose an action to perform: select **Export to a file** and click **Next**
- Create a file of type: select **Comma Separated Values** (Windows) and click **Next**
- Select folder to export from: **select your Contacts folder** and click **Next**
- Save exported file as: click **Browse**, navigate, **choose a location to save the CSV file**
- File name: **enter a file name** (e.g., Outlook Contacts) and click OK
- Click **Next**
- Click **Finish** to export
- Click **Cancel** to close the advanced options screen in Outlook

### To import Outlook contacts into the Contact List tab:

- From the **Contacts** tab, click on the **Import** button
- CSV File: Click on **Choose File**, navigate to the save location of the Outlook contacts CSV file, **select the file**, and click **Open**
- Action when contact exists: **Select an option** for what should happen if a contact you are importing matches a contact already defined in your contact list – see **Matching Contacts** section below
- Click on **Import** to start the import operation. If you are importing a large number of contacts, this may take some time to complete.
- Once the process has completed, you will be shown counts of the number of new contacts added, existing contacts updated, and, if appropriate, counts of how many existing entries were deleted and how many imported contacts were ignored (see matching contacts). At this stage you can also click on the **Details** button to check what updates have been made to your contact list.
- Having checked the counts and details, if you are happy then press the **Confirm** button to commit the changes or **Cancel** to cancel

### Matching Contacts

Generally, an imported contact is considered to match an existing contact if they have the same name. The only exception to this is if you have previously exported your contacts using Native format.

- If there is a match, but the two versions do not contain any conflicting information then the import operation will simply add any additional details from the imported version of the contact to the existing version
- If there is a match, and the two entries conflict with one another (e.g. you have an existing entry for John Smith with his address as 101 Mountview Drive, and you are importing an entry for John Smith which has his address as "17 Pelican St"), what happens depends upon the action you chose in the import contacts screen:
  - **Overwrite the contact:** The imported version will overwrite the version already in your contact list. You should select this option if you are confident that the list of contacts you are importing will always contain the most up-to-date information.
  - **Duplicate the contact:** The imported version will be added as a new contact list entry, so, in the example above you will end up with two entries for John Smith. You can then go through and manually choose whether to keep one or both entries once the import process has completed.
  - **Ignore imported entry:** The entry will not be imported, and the version currently in your contact list will be left unchanged. You should select this option if you are confident that your existing contact list will always contain the most up-to-date information.

## 6.8 Contact List Export

This feature allows you to export your contacts as a CSV text file. This is useful if you wish to import your contacts into another application such as Microsoft Outlook or Outlook Express.

### To export your contacts:

- From the **Contacts** screen, click on the **Export All** button to open the export contacts screen
- **Export mode: select the appropriate mode** from one of the following:
  - **Outlook/Outlook Express compatible:** Select this option if you wish to subsequently import your contacts to Microsoft Outlook, Outlook Express or some other application that supports importing contacts from Outlook or Outlook Express.
  - **Windows Contacts on Vista:** Select this option if you wish to subsequently import your contacts to Windows Contacts on Vista.
  - **Native format:** For advanced-level end users only. In native format, each exported contact list entry also includes a unique numerical identifier. If a CSV file containing such identifiers is subsequently re-imported, then contacts in the CSV file are considered to match entries in the contact list if their numerical identifiers match; matching is done on the basis of this identifier in preference to using the contact name. This is valuable if, for example, you wish to export your contacts to a spreadsheet, make a set of changes and then re-import them - even if you change a contact's name, it will still be correctly correlated with the existing contact list entry.
- Click on the **Export** button
- Once the export operation has completed, you will have the opportunity to **specify where you wish to save the exported file**

**Note:** Exported data does not include any information about what contact groups the contacts may belong to.

### Troubleshooting

#### *I've added an entry to my contact list, but I cannot find it by name in the contact list column.*

The contacts column only shows the names for entries that match what you have already typed into the search box - delete a few characters to widen the search again.

*I've added someone to my contact list, but when I receive calls from them, I do not see their name in my call history.* The number as shown in the call history list does not sufficiently closely match the number configured in your contact list.

## 6.9 Extensions

From the Contacts screen, click on the Extensions tab to view extensions in the business group. You can search by typing in the search box above the table. The list will be restricted to those items that match.

Extensions allow you to quickly dial other numbers in the business group.

### 6.10 Short Codes

Short codes allow you to dial a 4-digit code to place a call to an external number. A short code must be unique number that does not match any extension number configured on your VoIP Phone System. Short Codes are set at the department level.

You can search for a short code by typing in the search box above the table. The list will be restricted to those items that match.

End users are not able to modify Short Codes in the User Portal. Short Codes can be added/deleted by the business group administrator via the Administrator Portal.

## 7 Call Forwarding

### 7.1 Forward All Calls

#### To 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

### 7.2 Forward Calls when 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 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)
  - Click **Apply** to save

- 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
  - 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)
  - 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
  - Click **Apply** to save

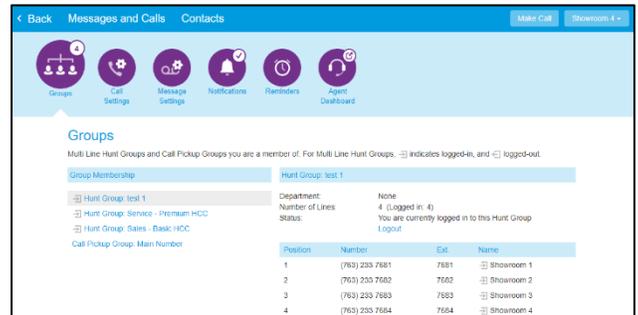
## 8 Groups

If you are a member of any groups, you will see the Groups icon under Your Services. Click on **Groups** to display the MLHGs (Multi Line Hunt Groups) and Call Pickup Groups that you are a member of.



### 8.1 Group Membership

Click on any group in the list to select it and view the group details on the right side of the screen.



### 8.2 Group Details

The Group Details panel shows the details for the selected group.

**For all types of groups, the following details are shown:**

- Number of lines in the group
- For each line in the group: The telephone number, extension, and name of the line

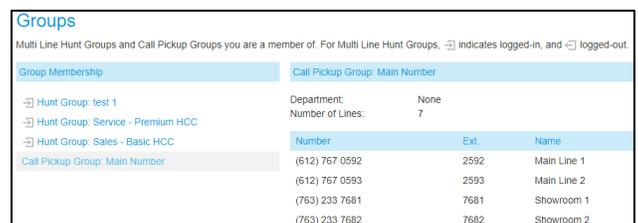
**For MLHGs the following additional details are shown:**

- Department name (if specified) or None
- Number of lines logged in for the group
- The currently logged in/logged out status of your line. If your MLHG supports Login/Logout (Business Group administrator determines this setting in the Administrator Portal) you may login/logout by clicking on the **Login** or **Logout** link.
- List of lines within the MLHG
- Position of each line within the MLHG
- For each line in the group, the logged in status is shown as either logged in or logged out



**For Call Pickup Groups, the following additional details are shown:**

- Department name (if specified) or None
- The number of lines in this Call Pickup Group
- List of lines within the MLHG



## 9 Settings

### 9.1 Account Settings

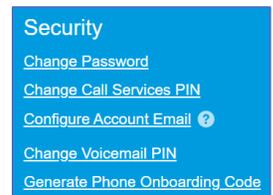
**Personal Details** (bottom left corner of the screen):

- **Name:** This is the name that is associated with your Messaging account. It is used in the From address when you forward a message as an e-mail.
- **Department**
- **Admin** (displays if you are a business group administrator)



**To change your account password:**

- Under Security, click on **Change Password**
- In the Change Password screen, **enter the current and the new password**, and then **confirm the new password by entering it again**. For security, the text will be hidden as you type.
- Your password must contain one letter, one number, and one special character
- Click **Confirm** to save or **Cancel** to cancel



**Change Call Services PIN:**

- This option does not apply to POPP Communications VoIP Phone Systems

**Configure Account Email:**

- Under Security, click on **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

**Change Voicemail PIN:**

- Click on **Change Voicemail PIN**
- In the Change PIN screen, **enter the Current PIN** (initial PIN provided by POPP), the **New PIN**, and then **Confirm the new PIN by entering it again**
- Click **Confirm** to save or **Cancel** to cancel

**Generate Phone Onboarding Code:**

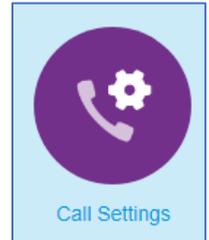
- Certain phone models require a phone onboarding code to be connected to the phone system for the first time. There is no need to Generate a Phone Onboarding Code unless instructed to do so by POPP.

## 9.2 Telephone Configuration

See Telephone Configuration user guides on [popp.com/support](http://popp.com/support) > Portals

## 9.3 Call Settings

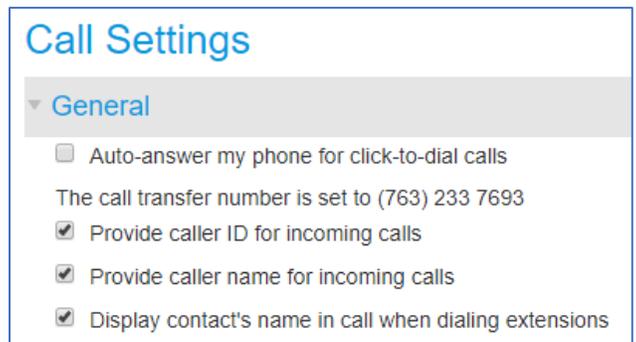
Under Your Services, click on the **Call Settings** icon to view and customize the following settings:



### General Call Settings

You can customize the following general settings:

- **Auto-answer my phone for click-to-dial calls:** Check this box to auto-answer your phone when making click-to-dial calls
  - **The Call Transfer number is set to:** This is the number that callers will be transferred to if they dial 0. This number can only be modified by the Business Group administrator
  - **Provide caller ID for incoming calls:** Check the box to display Caller ID Number from incoming calls
  - **Provide caller name for incoming calls:** Check the box to display Caller ID Name for incoming calls
  - **Display contact's name in call when dialing extensions:** Check the box to display contact's name when dialing an extension
- Click on **Apply** to save or **Cancel** to cancel

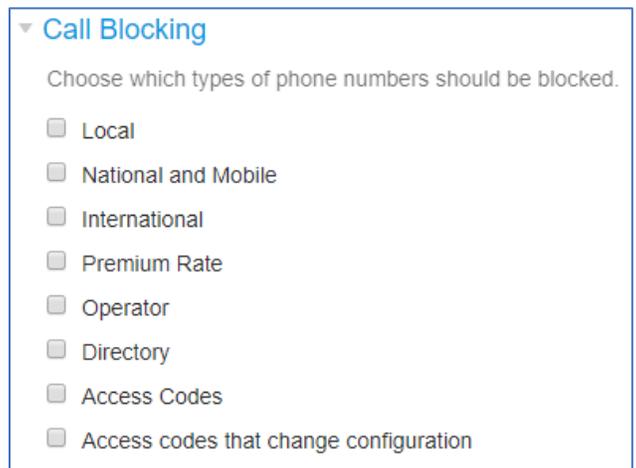


### Call Blocking Configuration

This service allows you to restrict which types of calls can be made from your telephone.

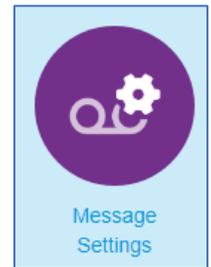
Check the box next to each option in order to block the following types of outbound calls:

- Local (local calls)
  - National & Mobile (1+)
  - International (011)
  - Premium Rate (900/976)
  - Operator (0)
  - Directory (411)
  - Access Codes (\* codes)
  - Access codes that change config. (\* codes that change the configuration of the line. i.e., call forwarding)
- Click on **Apply** to save or **Cancel** to cancel



## 9.4 Message Settings

Under Your Services, click on the **Message Settings** icon to view and customize the following voicemail and fax message settings:



### General Settings

This panel allows you to set the following messaging options:

- **Incoming calls are forwarded to voicemail after:** This allows you to set the time in seconds that your phone rings before the call is sent to voicemail. The acceptable range is from zero to 60 seconds and 6 seconds = 1 ring
- **Forward messages and faxes as e-mails:** Checking this box allows for messages (voicemails as .wav files and faxes as .pdf files) to be forwarded to an e-mail address that you specify by clicking on the **Voicemails** or **Faxes** check box next to the desired e-mail. The e-mail will include the phone number of the caller and the voicemail message as an attachment. Click on **add an email address link** to enter the e-mail address for messages to be forwarded to. Voicemail messages and faxes can be forwarded to multiple e-mail addresses.
- **Leave original in Inbox:** Check this box to leave the original voicemail or fax message in the Messages inbox in the User Portal. If you have selected to forward messages to your e-mail, you may want to uncheck this box so that your Messages inbox in the User Portal does not get full.
- **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
  - Mark this message as read
  - Mark all messages as read
  - Log in to your voicemail account
- Click on **Apply** to save or **Cancel** to cancel

### Mailbox Access Settings

These settings allow you to customize your experience when accessing your mailbox via the telephone as follows:

- **Skip PIN:** If Skip PIN is enabled, then when accessing your mailbox from your own telephone you are not required to enter your PIN. This saves you time, but reduces security as anyone with access to your telephone can access your mailbox.
- **Fast Login:** Generally, when you dial into your mailbox you are asked to enter both your phone number and PIN. If Fast Login is enabled, then when accessing your mailbox from your own telephone, your phone number is recognized automatically and you only need to enter your PIN.
- **Auto-Play Voicemail/Fax:** When enabled, your messages will start playing immediately when you dial into your mailbox (instead of instead of hearing the main menu)
- **Voicemail Playback:** When your messages are played to you, you can choose whether you wish to hear the message details and message (who the message is from and when it was left), the message only, or details only
- Click on **Apply** to save or **Cancel** to cancel

## Voicemail Greeting Settings

Select which voicemail greeting you would like to use from the following:

- **Extended Absence:** “[your personalized message]”. If you have not recorded a personalized message, you will be prompted to record it.
- **Forward All Calls:** “[your personalized message]”. If you have not recorded a personalized message, you will be prompted to record it.
- **Personal:** “[your personalized message]”. If you have not recorded a personalized message, you will be prompted to record it.
- **System with Name:** “[your recorded name] can’t take your call now”. If you have not recorded your name, you will be prompted to do record it.
- **System with Number:** “Telephone number [nnn-nnn-nnnn] can’t take your call now”
- **System:** “The person you have dialed can’t take your call now”

▼ **Voicemail Greeting**

Use the greeting: System with number ▼

▼ [more options](#)

- Use a different greeting when I'm in a call. [record](#)
- Use different greeting outside business hours. [record](#)
- Use different greeting within my business group. [record](#)

Click on **more options** link to:

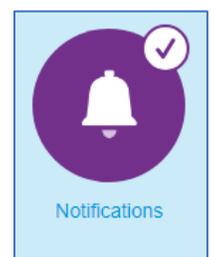
- **Use a different greeting when I'm in a call:** Allows you to record and play a different voicemail greeting to callers when you're on a call.
- **Use a different greeting outside business hours:** Allows you to record and play a different voicemail greeting to callers outside of your business hours. To configure your schedule:
  - Call in to the voicemail telephone user interface
  - From the main menu, press [3] for greetings
  - Press [6] for out of hours greeting
  - Press [2] to modify your schedule
- **Use a different greeting within my business group:** Allows you to record and play a different voicemail greeting to callers within the Business Group.

## For Phone Access

To access your voicemail from any phone, dial **651-789-7688**.

## 9.5 Notification Settings

Under Your Services, click on the **Notifications** icon to configure the following notification settings.



## Message Waiting Indicator Configuration

- **Send phone notification of incoming messages to the following phone numbers:** Check this box to enable the message waiting indicator (MWI) when a new message is received. Uncheck this box to disable the MWI feature.
- Click on **Apply** to save or **Cancel** to cancel

When MWI is enabled, the message waiting indicator (red light at the top of your telephone) will be lit and you will hear a stutter dial tone when you pick up your handset to notify you that a new message has been received. If you have multiple telephones, you may add multiple numbers to the list.

### To add a phone number:

- Click on **New Entry**
- Enter your business group line **phone number**
- Click **Add**
- To change the types of messages that trigger the message waiting indicator, **check the box(es)** to select:
  - All Faxes
  - Urgent Voicemail
  - All Voicemail
- Click on **Apply** to save or **Cancel** to cancel
- If you have multiple telephones assigned to you within the same Business Group, repeat this process to add each additional phone number

Phone Number	All Faxes	Urgent Voicemail	All Voicemail	
(763) 233 7680	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	X

### To delete a phone number:

- To delete a phone number from the list, click on the delete **X** icon
- To clear the entire list, click on the Clear List button
- Click on **Apply** to save or **Cancel** to cancel

## **E-mail Settings**

This feature enables you to configure the voicemail system to send you an e-mail notification when a new message is received.

**Note:** E-mail notification does not include the message itself. You will need to log in to the User Portal or call in to listen to your messages. If you wish, you can have e-mail notifications sent to multiple different e-mail addresses.

- **Send email notification of incoming messages to the following addresses:** Check this box to enable e-mail notifications when a new message is received. To disable these notifications, uncheck the checkbox. When e-mail notification is enabled, you will receive an e-mail notifying you that a new message has been received.

Email Address	All Faxes	Urgent Voicemail	All Voicemail
joebrown@abccompany.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### **To add an e-mail address:**

- Click on **New Entry**
- Enter your **e-mail address**
- Click **Add**
- To change the types of messages that trigger the e-mail, **check the box(es)** to select:
  - All Faxes
  - Urgent Voicemail
  - All Voicemail
- Click on **Apply** to save or **Cancel** to cancel
- Repeat this process to add additional e-mail addresses if desired

### **To delete an e-mail address:**

- To delete an e-mail from the list, click on the delete  icon
- To clear the entire list, click on the Clear List button
- Click on **Apply** to save or **Cancel** to cancel

## Outdial Settings

Configure the **Outdial** feature to call a specified number to notify you when a caller dials “0” to leave a voicemail message.

### To set up Outdial notification:

- Check the box for **Send outdial notification of incoming messages**
- **Specify the phone number to send outdial notifications to:** enter the 10-digit phone number to be called
- **Choose the incoming messages that should be notified:** Check the box(es) for the desired options:
  - Urgent Voicemail
  - All Voicemail
  - All Faxes
- **Set the delay between receiving the message and receiving the notification for the message:**
  - Select a delay for normal messages
  - Select a delay for urgent messages
- **Set a retry limit and delay between retry attempts until the message is marked as read:**
  - Number of outdial retry attempts
  - Delay between retries (minutes)
- **Stop retries when you answer the call or Stop retries only when you access voicemail**
- Click **Apply** to save or **Cancel** to cancel

## 9.6 Reminders

Under Your Services, click on the Reminders icon to configure your telephone to ring at a specified time (for example as a wake-up call) and play a reminder message that you have recorded at one of the following intervals:

- once at a time of your choice in the next 24 hours
- every week at a time and day of your choice
- every weekday at a time of your choice
- every day at a time of your choice



### To schedule a new reminder call:

- Check the box to **enable reminder calls for this line** at the top of the page
- Click on the **New Reminder** button to bring up the New Reminder screen
- **Description:** Enter a description for the reminder
- **Phone number to notify:** Select the phone number that you wish to receive the reminder call on. You can only schedule reminders on telephones that are registered to your account.
- **Occurs:** Select how often you would like the reminder – once, every weekday, or every day
- **Time:** Set the time for the reminder. You must also elect the date if you are scheduling a one-time reminder. All times must be entered relative to the time zone in which your line is registered. All times must be entered relative to your configured time zone.
- Click on **Play/Record:** Record the message that you want to be played when you answer the reminder call. If you don't record a message you will still receive a call at the specified time. You will only hear “This is a reminder call”, but will not have the option to dial 1 to hear your reminder message.
- Click on the **Add** button to return to the main reminders page.
- Click **Apply** to save or **Cancel** to cancel

**To cancel a currently scheduled reminder call:**

- Click the delete  icon next to the reminder call that you wish to cancel
- To cancel all reminder calls, click on the Clear List button
- Click **Apply** to save or **Cancel** to cancel

**To disable the reminders service:**

- Uncheck the **enable reminder calls for this line** box at the top of the page
- Click **Apply** to save or **Cancel** to cancel

## **10 Additional Information**

**For additional training and support:**

- Visit [www.popp.com](http://www.popp.com) or call POPP Communications at 763-797-7900