



1 CommPilot Personal Web Portal

1.1 Customizing Phone Features and Services

As a new user to the system, you are ready to take advantage of personal call management by: updating your profile and password, setting up Call Forwarding and Voice Messaging, and creating your Personal Phone List.

In order to do so, you must first **Log In** to the Spirit Telecom VOIP Web Portal:

1.1.1 Log In to the Spirit Telecom VOIP Web Portal

1. Go to the Spirit VOIP Web Portal by entering “**voip.spirittelecom.com**” on your browser’s address bar.
2. The CommPilot **Log In** page displays requesting a valid **User ID** and **Password**.
3. Enter your assigned **User Id**; do not use spaces, dashes, or parentheses.
4. Click in the **Password** text box.
5. Enter your **Password**.

***Note: The Default User Password is “changeme,” which can be used until another password is assigned by the user.**

6. Press the **Enter** key or click the **Login button**.
7. The CommPilot Personal home page and the CommPilot Call Manager page display as two separate windows. * If **CommPilot Call Manager** fails to display as a separate window, click the **Call Manager** link on the Personal home page to view the Call Manager window.

1.1.2 Remember Password

1. Check the **Remember Password** box on the Login page.
2. A cookie has now been set on your machine, allowing you to bypass the Login page upon future use of the Broadworks Internet address.
3. Your home page displays automatically.

***Note: You must recheck Remember Password each time you change your password.**

***Note: If you have multiple login Ids, complete these steps only for your most frequent used login/ password.**

1.1.3 Closing a Session

1. On any page in the system, click the **Logout Link** in the upper right corner of the page.
2. Once you log out, you can log in again using your existing User Id and Password, or you can log in with a different User Id and Password.

After you have successfully logged in to the CommPilot Personal Portal, the User Profile page appears which contains a list of **Options**, **System Links**, and **Profile** menu items.

1.1.4 System Links

The System Links are available on every page as follows:

- **Call Manager:** click to display the CommPilot Call Manager;
Help: click for Online
- **Help:** click for Online Assistance, and the Help page associated with the current page.

2 Profile

Profile allows you to view and maintain your personal information. The text entered specifies your primary phone number, extension and device used for handling calls. By providing additional information, you enable other group members in the group phone list to view your personal contact information such as your mobile phone or pager numbers. Your administrator can only modify some of this information.

2.1 Passwords

The Passwords menu page allows you to configure your passwords for the web portal and/ or voice portal. Here you can change both the user's login password and the user's voice portal password.

2.1.1 Change Passwords

1. Click **Passwords** on the **Profile** menu page.
2. To change the Password that allows the user to login to Broadworks, click **Set Web Access Password**.
3. Clicking **Set Voice Portal Password** changes the code that allows the user to change voice-messaging options via the telephone.
4. Type the current password.
5. Type the new password. You are required to confirm the new password by typing it a second time.
6. Click **OK** or **Apply**.

2.1.2 Forgot Password

1. Notify your company administrator to have your password reset.
2. Upon receiving your new password, log in and then use the Password page to reset your password.

2.2 Time Schedule

The Time Schedule allows you to add personal schedules in addition to group schedules.

2.2.1 Add a Time Schedule

1. Click **Add**. The **Time Schedule Add** page is displayed.
2. Name the schedule: Type the name of the schedule in the **Time Schedule Name** text box.
3. Select a start day for the entry: From the **Start Day** drop-down list, select the day to start the entry.
4. Select a start time for the entry: Type the start time and select **AM** or **PM** from the drop-down list.
5. Select the end day for the entry: From the **End Day** drop-down box, select the end day of the entry.

6. Select the end date for the entry: Type the end date and select **AM** or **PM** from the drop-down list.
7. Add additional entries to the schedule: Repeat steps 2-5 for each entry to add to the schedule.
8. Save your changes by clicking **OK**. Your changes are saved and the previous page is displayed.
9. To exit without saving, click **Cancel** or select another page.

***Note: Personal Schedules effect the following service configurations:**

- **Selective Call Forwarding**
- **Selective Call Rejection**
- **Selective Call Acceptance**
- **Priority Alert**

2.2.2 Modify a Time Schedule

1. Click the **Edit** link next to the entry to edit. The **Time Schedule Modify** page is displayed.

2.2.3 Delete a Time Schedule

1. Click the **Edit** link next to the entry to edit. The **Time Schedule Modify** page is displayed.

***Note: This action cannot be undone. Once you click OK or Apply, the entry is permanently deleted.**

3 Incoming Calls

The Incoming Calls menu page allows you to set your preferences for handling incoming calls. Using this page, users can activate/ deactivate incoming call services and features by turning them On or Off. To access the menu page for a particular service, click on the link for that service.

3.1 Anonymous Call Rejection

Anonymous Call Rejection enables users to reject calls from anonymous parties who have explicitly restricted their Caller ID. By activating the service via a web interface, callers without available caller identification are informed that the user is not accepting calls at that time. The user's phone does not ring and the user does not see or hear an indication of the attempted call. This service does not apply to calls from within the group.

3.1.1 Activate Anonymous Call Rejection

1. On the Incoming Calls menu page, click **Anonymous Rejection**. The Reject Anonymous Caller defaults to Off.
2. To apply this service, click the **ON** radio button.
3. Save your changes.
4. Click **Apply** or **OK**.
5. Click Cancel to exit without saving.

3.2 Calling Line ID Blocking Override

With this service assigned, users always receive the Calling Line ID of incoming calls if available regardless of whether or not it is blocked by the calling party.

3.2.1 Activate Calling Line ID Blocking Override

1. Activate Calling Line ID Blocking Override by clicking the **ON** radio button.
2. Save your changes. Click **OK** or **APPLY**.
3. Click Cancel to exit without saving.

3.3 Calling Name Retrieval

Calling Name Retrieval looks up the name of a caller in an external database if the name did not arrive with the original call. This feature is especially helpful in identifying callers when using the CommPilot Call Manager, phones that display CLID information, or other call clients.

3.3.1 Caller Name Look Up

1. Activate Calling Name Retrieval by clicking the **ON** radio button.
2. Save your changes. Click **OK** or **APPLY**.

3.4 Call Forwarding Always

Call Forwarding Always enables you to redirect all incoming calls to another phone number. Users have the option to activate or deactivate this service by dialing a feature code, as listed below, or configuring the service via the web interface. If activated, the user must specify the forwarding number.

● **Note:**

Call Forwarding Always Feature Access Codes
Activate *72 Deactivate *73

***Note:** A status indicator on the CommPilot Call Manager identifies whether this service is enabled.

3.4.1 Activate Call Forwarding Always

1. Click **Call Forwarding Always** on the Incoming Calls menu page.
2. Click **Call Forwarding Always On**. When the Call Forwarding service is On, calls will be sent to the number you have designated in the **Calls Forward to** field.
3. Type a phone number to which you would like to forward incoming calls.
4. Click **Play Ring Reminder when a call is forwarded**, if required.
5. Click **OK** or **APPLY**.

From Your CommPilot Call Manager

1. You can access the Call Forwarding Always page by clicking **CFA** on your CommPilot Call Manager window.
2. When the button to the left of the CFA link on the CommPilot Call Manager is selected, this service is On. When it is not selected, the service is Off.

From Your Voice Portal

Call Forwarding Always can also be activated using your voice portal. To do this:

1. Lift the telephone handset and dial ***72** followed by the phone number to which your calls should be redirected.
2. Replace the handset. The Call Forwarding Always service is On.
3. Your calls remain forwarded until you dial the deactivation code.

3.4.2 Deactivate Call Forwarding Always

1. Lift the telephone handset. Press assigned code ***73**.
2. Replace the handset. The service is Off.

From Your Web Portal

Call Forwarding Always can also be activated using your web portal:

1. Turn Call Forwarding Always On by clicking the **ON** radio button. Calls will now be sent to the number you have designated in the Call Forward to field.
2. Confirm or enter the phone number. If the phone number indicated is the number to which all of your calls should be forwarded, no action is necessary.
3. Select whether or not to play a Ring Reminder: The **Play Ring Reminder when a call is forwarded** check box causes the service to play a short ring burst at your office phone when a call is forwarded.
4. Click **OK** or **Apply**.

***Note:** Type the new phone number in a valid format (no dashes, parentheses, or spaces are necessary.)

***Note:** To forward to a long distance number, it must be preceded by a “+” and a country code.

3.5 Call Forwarding Busy

Call Forwarding Busy allows you to redirect calls to another destination when an incoming call encounters a busy condition. Users have the option to activate and deactivate this service by dialing a feature code, listed below, or configuring the service via the web interface. If activated, the user must specify the forwarding number.

● **Note:**

Call Forwarding Busy Feature Access Code
Activate *90 Deactivate 91

3.5.1 To Activate Call Forwarding Busy:

1. On the **Call Forwarding Busy** feature page, click **On**.
2. Confirm or enter the number to which you would like to forward your calls in the **Calls Forward to text** box.
3. Save your changes. Click **OK** or **APPLY**.

***Note:** If you type an invalid phone number, you are prompted to retype it.

3.6 Call Forwarding No Answer

Call Forwarding No Answer enables a user to redirect calls to another destination when an incoming call is not answered within a specified number of rings. Use this service when you would rather have a secretary or co-worker receive a missed call instead of the caller being sent to your voice messaging box. Users have the option to activate or deactivate this service by dialing a feature code, listed below, or configuring the service via the web interface. If activated the user must specify the forwarding number and number of rings before forwarding.

● **Note:**

Call Forwarding No Answer Feature Access Codes
Activate *92 Deactivate *93

3.6.1 Activate Call Forwarding No Answer

1. On the feature page, click **On**. When On, Call Forwarding No Answer forwards your incoming calls to the phone number you entered in the **Calls Forward to** text box.
2. Confirm or enter the phone number. If the phone number indicated is the number to which you want all of your calls forwarded, no action is necessary.
3. Indicate the number of times you want your phone to ring before the caller is directed to the specified number. The caller hears the same number of rings.
4. Save your changes. Click **OK** or **APPLY**.

***Note: Other services such as Voice Messaging, share this setting and if it is changed in one service, that change affects all other services.**

3.7 Call Notify

Call Notify allows a user to define criteria that cause certain incoming calls to trigger an email notification. If an incoming call meets user-specific criteria, an email or short message to a cell phone, is sent to the notify address informing the user of the details of the incoming call attempt. The user controls this service via a web interface, which provides the ability to set the notify email address and the criteria sets for determining which calls trigger a notification. A criteria set is based on incoming calling line identity, time of day, and day of week. Multiple criteria sets can be defined. All criteria for an entry must be true for an email to be sent (phone number/ day of week/ time of day).

3.7.1 Activate Call Notify

1. Click **Call Notify** on the Incoming Calls menu page.
2. Type the email address to which call notifications should be sent.
3. Click **Apply**.
4. Click **Add** to create a call notification.
5. To modify a notification that already exists, click the call notification name.

3.7.2 Create a Call Notify Instance

1. In the **Send E-Mail to** text box, type the address in valid format. If you type an invalid address, you are prompted to retype it.
2. Click **APPLY**
3. Click **Add**. The **Call Notify Add** page appears.

3.7.3 Edit a Call Notify Instance

1. Click **Edit** next to the instance. The **Call Notify Modify** page appears.

3.7.4 Delete a Call Notify Instance

1. Click **Edit** next to the instance. The Call Notify Modify page appears. You can then delete the Call Notify Instance.

3.7.5 Activate or Deactivate an Existing Call Notify Instance

1. Check the **Active** box next to an instance to activate.
 2. Uncheck the box to disable.
 3. By default, the **Active** box for this service is checked.
- ** This page displays a description of the group, if it has been provided by the user, as well as the days and times this feature is to be activated. The phone numbers (not extensions) that trigger Call Notify show in the **Calls from** column.
4. Click **OK** or **APPLY**.

3.7.6 Add Call Notify

Allows users to add a single-criteria entry for Call Notify. Specify the days and times you would like an email when the callers call. Also, you can have an email sent when only specified numbers call or all numbers call. If you need more than 12 numbers or more distinct time periods, you can create multiple call notify entries.

To Add:

1. Type the **Description** (name of notification).
2. Check **Everyday** or designate **Selected days**.
3. Check **All day** or select **Specific time range**.
4. In the **Calls From** box, check **Any Phone Number** or enter Specific phone numbers for a call notification.
5. Click **OK**.
6. The **Call Notify** page re-appears.
7. Activate or Deactivate service by clicking the box under the **Active** field. A check mark indicates the Call Notify service is active.

3.8 Do Not Disturb

The Do Not Disturb feature allows users to set their station as unavailable so that incoming calls are given a busy treatment. Users have the option to activate or deactivate this service by dialing a feature code, listed below, or configuring the service via the web interface. A status indicator on the CommPilot Call Manager identifies whether this service is enabled. In addition, users can receive a short ring burst on their primary phone when a call is being sent to voice messaging by enabling Ring Reminder.

** The **Do Not Disturb** menu page can be accessed from the CommPilot Call Manager window. When the Do Not Disturb (DND) button is selected, this service is on. When it is not selected, the service is off.

3.8.1 Activate/ Deactivate Do Not Disturb

1. To activate the service, click **On**. To Deactivate the service, click **Off**. When **On**, Do Not Disturb prevents your phone from ringing and callers are given busy treatment (such as being sent to Voice Messaging, if available, or forwarded to the specified number of the Call Forwarding Busy service.) The default for this service is **Off**.
2. Select whether to play a ring reminder.
3. Save your changes. Click **OK** or **Apply**.

3.9 External Calling Line ID Delivery

This page is used to view the caller ID information of callers from outside groups.

3.9.1 Activate/ Deactivate Calling Line ID Delivery

1. Click **On**, to activate the service. Click **Off**, to deactivate the service. The default for this service is **On**.
2. Save your changes: Click **Apply** or **OK**.

3.10 Incoming Calling Plan

This is a view only page that allows users to see what call types they are permitted to receive at their desk phone. Incoming Calling Plan enables administrators to block specified incoming calls to their company, department and/ or individual users. The Incoming Calling Plan is configured via the CommPilot Group web interface. A check mark in the Permitted column indicates that you can receive a type of call. If no check mark appears, you cannot receive such calls.

3.11 Internal Calling Line ID Delivery

Internal Calling Line ID Delivery allows the Calling line name and number for callers from inside your group.

3.11.1 Activate Internal Calling Line Delivery

1. To turn the service **On**, click **On**. To turn the service **Off**, click **Off**.
2. Save your changes. Click **Apply** or **OK**.

4 Incoming Calls Advanced Services

4.1 Alternate Numbers

Alternate numbers allows users up to three phone numbers and/ or extensions. Normal ringing is provided for incoming calls to the primary phone number and users have the option of enabling a distinctive ring for calls to their second and third phone numbers. For outgoing calls from the user, the primary phone number is the calling line identity.

4.1.1 Activate Distinctive Ringing

1. Select if the ring should differ for calls to alternate phone numbers by clicking **On** or **Off**.
2. Save your changes.
3. Click **OK** or **Apply**.

4.2 Call Forwarding Selective

Call Forwarding Selective enables a user to define criteria for forwarding certain incoming calls to alternate destinations. If an incoming call meets user-specific criteria, the call is redirected to the user-specified destination. The user controls the service via a web interface, which provides the ability to set the forwarding destination address and criteria sets for determining which calls require forwarding. A criteria set is based on incoming calling line identity, time or day, and day of week. Multiple criteria sets can be defined.

The user must designate one phone number as the default forwarding number. All specified calls are forwarded to the default unless the user adds criteria for numbers to be forwarded to another number. If the call is not forwarded, the call continues as if this service was off.

4.2.1 Set the Default Forwarding Number

1. In the **Call Forward to on Default** text box, type in the default number to which you would like your calls forwarded. This information is required.
2. Select **OK** to save the number. The screen refreshes.

4.2.2 Set the Ring Reminder

1. Check the **Play Ring Reminder when a call is forwarded** check box. No ring reminder is played if not checked.

4.2.3 Add, Modify, or Delete with Call Selective

1. To add an entry, Select **ADD**. The **Call Forwarding Selective Add** page is displayed. You use this page to add Call Forwarding entries.
2. To Modify or Delete and entry, click **Edit** to the right of the entry. The **Call Forwarding Selective Modify** page is displayed. You use this page to modify or delete Call Forwarding Selective entries.

4.2.4 View and Activate or Deactivate your Call Forwarding Selective callers and criteria:

1. A list of Call Forwarding Selective entries you have added or modified is displayed with a checkbox under **Active** at the left of each entry. The checkbox is checked by default, making the entry active. Clicking in the checkbox to remove the check deactivates the entry.
2. Clicking on any of the numbers in the list takes you to the **Call Forwarding Selective Modify** page from which you can view full details of all numbers you specified for this entry.
3. **Click Apply or OK.**

4.3 CommPilot Express

CommPilot Express enables users to pre-configure multiple profiles for managing incoming calls differently based on the user's status:

- **Available – In the Office**

In the event that you are in the office but away from your desk, you can use the **Also Ring this Phone Number** text box to type an alternative phone number where you can be reached, such as a mobile phone or the desk of a co-worker. When you receive a call, your phone rings and so does the other phone number that you provide for this option.

- **Available – Out of the Office**

Click a button to indicate where your calls are to be directed should they come in when you are away from the office. By default, the Have Voice Messaging Take the Call option for this service is selected. Check the Also Email me if a call comes in check box if you would like email notification of the incoming call.

- **Busy**

With this option, users can screen incoming calls, allowing just a few select ones to come through. All incoming calls are forwarded to your voice mail unless a check mark appears beside the Send all calls to Voice Messaging except calls from these Phone numbers box. When this option is selected, you can specify up to three phone numbers that are excluded from the Busy setup. Also type a phone number where these calls can be answered.

Check the Also Email me a notification when a Voice Message is received to check box to receive email notification.

- **Unavailable**

This profile allows you to be reached outside of normal business hours, or perhaps when you are away from the office for an extended period of time, like vacation. When selected, all incoming calls are forwarded to your voice mail, unless a check mark appears beside the Send all calls to Voice Messaging except calls from these Phone numbers box. When this option is selected, you can specify up to three phone numbers that are excluded from the Unavailable setup. Also type the number where these calls can be answered. Click a button to select the greeting you want callers to hear.

** Each profile includes preferences for managing the relevant incoming call functions that can be configured through a single easy to use web page. Users can also select their active profile via their CommPilot Call Manager. If a user elects to use CommPilot Express, it will take preference over all other service settings associated with processing incoming calls.

***Note: CommPilot Express can also be activated or options can be changed using your voice portal.**

***Note: When using CommPilot Express profiles, other services such as Call Forwarding, Call Notify, or Simultaneous Ring should not be used.**

4.3.1 Activate CommPilot Express

1. Select a profile
2. From the Drop-Down list, select your current status.
3. Save your changes
4. Click **OK** or **Apply**.

4.4 Priority Alert

Priority Alert enables users to define criteria to have certain incoming calls trigger a different call waiting tone (alert) or a different ringing cadence than normal calls. The user sets the criteria (incoming calling number, time of day, day of week) for determining which calls require priority notification via their CommPilot Personal Web interface. Multiple criteria sets, or profiles can be defined.

4.4.1 Enable or Disable Priority Alert

1. Check the **Active** check box beside the selection to activate.
2. To Deactivate an active priority alert, uncheck the **Active** check box beside the selection.
3. Save your changes.
4. Click **Apply** or **OK**.

4.4.2 Add a Priority Alert

1. Click **Add**. The Priority Alert Add page displays

4.4.3 Edit a Priority Alert

1. Click on **Edit** next to the instance. The Priority Alert Modify page displays.

4.4.4 Delete a Priority Alert

1. Click **Edit** next to the instance. The Priority Alert Modify page displays.

4.5 Selective Acceptance

Selective Acceptance enables a user to define the criteria by which certain incoming calls are accepted. If an incoming call meets user-specified criteria, the call is allowed to complete to the user. All other calls are blocked and the caller is informed that the user does not wish to receive the call. The user controls the service via a web interface where the criteria sets for incoming calls are established. A criteria set is based on incoming calling line identity, time of day, and day of week.

4.5.1 Accepting Calls from Specified Numbers:

1. Click **Selective Acceptance** on the **Incoming Calls** menu page.
2. Click **Add**. The Selective Call Acceptance Add page appears.

4.5.2 Add a Selective Acceptance Entry

1. In the **Description** text box, type the description of the phone numbers.
2. Type or Edit the **Days** and **Times** to receive calls from specified numbers.
3. **Any Phone Number** is set as the default which will accept all calls.
4. Click **OK**.
5. The Selective Call Acceptance page reappears.
6. Activate or Deactivate the service by clicking the box under **Active**. A check mark indicates the service is active.

***Note: You can use wild cards. The “?” is a wild card that can replace a single digit anywhere in a digit string. A trailing “*” represents a digit string and can only appear at the end of a string containing digits and “?” wild cards.**

4.5.3 Edit a Selective Acceptance Entry

1. Click and drag your mouse pointer over the information in the text box. The information highlights.
2. Press the **Delete** button on your keyboard to empty the text box of its contents, or simply begin typing to enter new information.
3. Edit the time schedule in which this service will be set. Select the time schedule for this service from the drop-down list.
4. Edit the phone numbers which trigger Selective Call Acceptance. To accept calls from all phone numbers, check the **Any Phone Number** box. Otherwise, click your cursor in a text box and enter a complete phone number that should trigger the service.
5. To Edit or Delete a phone number, click and drag your mouse pointer over the information in the text box. The information highlights. Press the **Delete** key on your keyboard to empty the text box of its contents.
6. Save your changes.
7. Click **OK**.

4.5.4 Delete a Selective Call Acceptance Entry

1. Click the **Delete** button. The instance is deleted and the **User-Selective Call Acceptance** page is displayed.

****Note: This action cannot be undone. If you click Delete, the instance is permanently deleted.**

4.5.5 Activate/ Deactivate an Existing Selective Call Acceptance Entry

1. To activate an instance, click the **Active** box next to it. Uncheck the box to disable the instance. By default, the Active box for this service is checked.
2. This page displays a description of the entry as provided by the user, as well as the days and times this feature is to be activated.
3. The phone numbers (not extensions) that trigger Selective Call Acceptance show in the **Calls from** column.
4. Click **Apply** or **OK**.

4.5.6 Selective Call Rejection Entry

1. In the **Description** text box, type a description of the phone numbers in this instance.
2. Select the time schedule to use this service from the drop-down list.
3. Type the phone numbers which trigger Selective Call Rejection. To reject Calls from any phone number, check the **Any Phone Number** check box. Otherwise, click your cursor in the text box and type the complete phone number to trigger the instance. You may enter up to 12 numbers for each instance.
4. Save your changes.
5. Click **OK**.

4.5.7 Edit a Selective Call Rejection Entry

1. Edit the description of the instance. To change an existing description, click and drag your mouse pointer over the information in the text box. The information highlights. Press the **Delete** button on your keyboard to empty the text box of its contents, or simply begin typing to enter new information.
2. Modify the time schedule accordingly. Select the time schedule to use this service from the drop-down list.
3. Type the phone numbers which trigger Selective Call Rejection. To reject calls from all phone numbers, check the **Any Phone Number** box. Otherwise, click your cursor in a text box and enter a complete phone number that should trigger the service.
4. To Edit or delete a phone number, click and drag your mouse pointer over the information in the text box. The information highlights. Press the **Delete** key on your keyboard to empty the text box of its contents, or simply begin typing to enter new information.
5. Save your changes.
6. Click **OK**.

4.5.8 Activate/ Deactivate a Selective Rejection Entry

1. Check the **Active** box next to an instance to activate.
2. Uncheck the box to disable. This page displays a description of the entry as provided by the user, as well as the days and times to activate this feature.
3. Save your changes.
4. Click **OK**.

4.6 Simultaneous Ring

With Simultaneous Ring, users can have multiple phones ring simultaneously when any calls are received on their primary phone number. The first phone to be answered is connected. Users may enter up to 10 phone numbers to ring when a call is received.

4.6.1 Activate Simultaneous Ring

1. Click **Simultaneous Ring** on the **Incoming Calls** menu page.
2. Click **Simultaneous Ring On** to activate this service.
3. Select how you would like to handle incoming calls.
4. Type a number in the **Phone Number** box.
5. Click **Add**.
6. Repeat steps 4 and 5 for each phone chosen to ring.
7. Click **OK**.

5 Outgoing Calls

5.1 Automatic Call Back

Automatic Call Back allows users to request notification when a busy line within their group becomes available. A distinctive ring will be used to notify you when the user is available. This service can be activated at any time.

1. Turn Automatic Call Back on or off: Click “On” or “Off.” When On, Automatic Call Back plays a prompt when you reach a busy line within your group to let you receive a notification when the line is available. The default for this service is “Off.”
2. Save your changes.
3. Click **OK** or **Apply**.

5.2 Call Return

With Call Return, you can call the last party that called you, whether or not the call was answered. To call back the last party, simply dial the call return feature access code listed below. Users can also execute call return via the CommPilot Call Manager. If the calling number is unavailable, an error message is received.

1. To Call Back the last calling party, Enter the **Call Return Feature Access Code** at your phone.
2. To Exit this page, Click **OK**. The **User-Outgoing Calls** menu is displayed.

● **Note:**



5.3 Last Number Redial

By clicking the “Redial” button on your CommPilot Call Manager, users can redial the last number called from their phone. This feature can also be activated by dialing the feature access code listed below.

1. Enter the **Last Number Redial** feature access code at your phone. Or, click the **Redial** button on your CommPilot Call Manager.
2. Click **OK**.

● **Note:**



5.4 Calling Line ID Delivery Blocking

Calling Line ID Delivery Blocking allows you to block your number from being shown when calling other numbers. Regardless of whether this service is on or off, caller information cannot be blocked within a group. When you make a call to a user in your group, your information is revealed on the CommPilot Call Manager of that person. When a call arrives from a user in your group, the caller's information displays in your Call Manager. Please note that some phones are set to refuse calls from "blocked numbers" – similar to Anonymous Call Rejection.

5.4.1 Activate Calling Line ID Delivery Blocking

1. Click "On" or "Off" to select whether to conceal your phone number from people you call.
2. Save your changes.
3. Click **Apply** or **OK**.

5.5 Outgoing Calling Plan

Outgoing Calling Plans enable administrators to block users from making certain types of outgoing calls, such as long distance, toll, or premium numbers. The Outgoing Calling Plan is configured via the CommPilot Group web interface. In addition to being able to configure which types of calls each user is restricted from making, group administrators may regulate outgoing calling by restricting specific digit patterns. If a profile has not been configured for a particular user, the default set of outgoing call privileges for the department or group is applied.

The Outgoing Calling Plan page allows you to view the calling plan rules for your outgoing calls. Only your administrator can change which call types are permitted. A "Y" in the permitted column indicates that you can make this type of call; "N" indicates you cannot. If an "A" appears in the permitted column, an authorization code is required to make this type of call. If a "Tx" (where x=1,2 or 3) appears, the call is transferred to another number. Emergency calls such as 911 and 311 are permitted.

5.6 Speed Dial 8

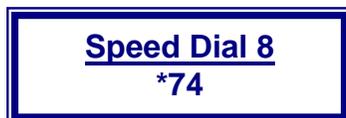
With Speed Dial 8, users can dial single digit codes to call up to 8 different numbers such as frequently dialed numbers or long strips of digits that are hard to remember. You can dial a speed dial code instead of the full number to place calls.

To use speed dial from the phone:

1. Enter a phone number: Type a complete phone number, including a country code if necessary for dialing on your system.
2. Enter a name: Type a name or description for the speed dial code. This name does not effect the operation of the speed dial code.
3. Save changes: Click **Apply** or **OK**.

***Note: Speed Dial 8 can also be programmed using a Feature Access Code.**

 **Note:**



5.7 Speed Dial 100

Speed Dial 100 enables users to dial two-digit codes to call up to 100 frequently called numbers. Entry of the two-digit code is preceded by a configurable prefix: 0-9, or # (default). Users may program the numbers in their directly via the Speed Dial 100 page in their CommPilot Personal web portal, or directly through their phone using the respective feature access code.

5.7.1 To Set a Speed Dial 100 code

1. Click the **Add** button. The Speed Dial 100 page is displayed.
2. Select a two-digit speed dial code. Use the drop-down list to select a speed dial code to assign to the phone number.
3. Select a description for the speed dial number. Type a description for the phone number in the **Description** box for your reference in your Speed Dial 100 list.
4. Specify the phone number to assign to the speed code. Type the phone number to assign to the speed code in the **Phone Number** text box.
5. Save your changes: Click **OK**.

● **Note:**

Speed Dial 100
***75**

5.7.2 Modify a Speed Dial 100 Entry

1. Click the **Edit** link next to the entry to edit.
2. Enter a new description or phone number for the entry in the text boxes. You cannot edit the speed code assigned to the entry.
3. Save your changes. Click **OK**.

5.7.3 Delete a Speed Dial 100 Entry

1. Click the **Edit** link next to the entry to edit.
2. Check the **Delete** box next to the entry to delete.
3. Save your changes. Click **OK**.

6 Outgoing Calls Advanced Services

6.1 Outgoing Digit Plan

Enables Administrators to block users from making certain types of outgoing calls, such as long distance, toll or premium numbers. The Outgoing Plan is configured via the CommPilot Group web interface. In addition to being able to configure which types of calls each user is restricted from making, group administrators may regulate outgoing calling by restricting specific digit patterns.

6.2 Personal Phone List

Using Personal Phone List, users can dial frequently called numbers by selecting from a searchable list of names on their CommPilot Call Manager. Each user can add, delete, edit and re-order numbers in their Personal Phone List, which serves as a personal speed dial list. Users can add multiple numbers to this list by uploading them from a flat file.

This list is created and edited by users. By selecting a name from the drop-down list of speed dial numbers, the CommPilot Call Manager will dial the person's phone number. Text files of names and phone numbers can be loaded to the Personal Phone List using the import feature.

6.2.1 Add Contact

1. Click **Personal Phone List** on the **Outgoing Calls** menu page.
2. Click **Add** on the Personal Phone List page. The **Add to Personal Phone List** page displays.
3. Type the **Name** and **Number** exactly as you want them to appear in the dialing list.
4. Click **OK**.

***Note:** All numbers must be ten digits and long-distance numbers must include a 1.

6.2.2 Modify Contact

1. Click **Personal Phone List** on the **Outgoing Calls** menu page.
2. To modify or delete a name on this list, click **Edit** or any item on the row. The Personal Phone List Modify page appears.
3. Edit the name or the number and then click **OK**.
4. Click **Delete** to remove the name from the list.

6.2.3 Import Personal Phone List Entries

1. Click **Personal Phone List** on the **Outgoing Calls** menu page.
2. Click **Import Phone List**.
3. In the **Select a Phone List File** text box, type the file name or click **Browse** to locate the .CSV file.
4. Click **Open**.
5. Click **Import**.
6. Click **OK** or **Apply**.

7 Call Control

7.1 Barge-In Exempt

Users with this service assigned cannot have their calls barged in on by other users.

7.1.1 Activate Barge-In Exempt

1. Click “On” or “Off” on the Barge-In Exempt menu page. When this service is on, others within your group cannot interrupt your calls with the Directed Call Pickup. When Off, others within your group can join or pickup your calls with the Directed Call Pickup. The default for this service is “On.”
2. Save your changes. Click **Apply** or **OK**.

7.2 Call Waiting

Call Waiting is a service that allows a user to answer a call while already engaged in another call. When the second call is received, the user is informed via a call waiting tone. To answer the waiting call, the user depresses the flash hook. The user then connects to the waiting party while the original party is placed on hold. By depressing the flash hook, the user reconnects to the original party and holds the waiting party. The feature completes when any party hangs up. Users can also execute call waiting via the CommPilot Call Manager.

7.2.1 Activate Call Waiting

1. Click “On” or “Off.” When this service is On, users will hear a beep upon receiving a call while taking another. You can put the first call on hold to answer the second incoming call.
2. When this service is off, calling parties will hear a busy tone when the user is on another call.
3. Save your changes. Click **Apply** or **OK**.

7.2.2 Call Waiting via CommPilot Call Manager

1. The telephone handset must be picked up on the initial incoming call.
2. In display area, click to highlight the call to answer.
3. Click **Talk**. The existing call is placed on hold automatically.
4. Select the holding call and click **Talk** again to return to the initial call. The existing call is placed on hold.

7.3 Customer Originated Trace

This page is used to view the service description. To use the Customer Originated Trace service, users must dial a feature access code as listed below. Your service provider then places a trace on your last incoming call.

***Note: The Customer Originated Trace must be specifically assigned to you by your group administrator.**

7.4 Directed Call Pick Up

With this service, a user can answer a call directed to another phone in their group by dialing the respective feature access code, followed by the extension of the ringing phone.

7.4.1 Activate Directed Call Pick Up

1. Lift telephone handset. Press the assigned code (*97).
2. Enter the extension where the call is ringing. You answer the ringing call at the specified extension.

*Note:



7.5 Directed Call Pick Up with Barge In

Users with this service assigned may dial a feature access code followed by an extension to pick up a call directed to another user in the same customer group, or barge-in on the call if already answered, thereby creating a three-way call. Administrators can configure whether or not a warning tone is played when a barge-in occurs.

Use this page to view the status of the tone indicator associated with the Directed Call Pick Up with Barge-In service. When the tone is “On” the caller hears a tone before you barge-in to an ongoing call.

1. To barge-in: Dial *33 followed by a two-digit code that is assigned for this service.

● Note:



7.6 Flash Call Hold

Flash Call Hold enables users to hold a call for any length of time by flashing the switch-hook on their phone and dialing the respective feature activation code. Parties are reconnected again when the switch-hook is flashed and the feature activation code is dialed again.

While engaged in one call:

1. Press flash-hook on phone.
2. Press the assigned code (*22).
3. You can now make a second call and toggle between calls.

● Note:



7.7 Flash Call Transfer

With Flash Call Transfer you can transfer a call even when your phone does not have a transfer button. To do so:

1. While engaged in a call: Press flash-hook on phone. The initial call is held.
2. Enter the complete phone number or extension of party to receive the call. You can press # to signal the end of the phone number or extension.
3. All parties are connected.
4. Hang up handset and drop out of the call and connect the other two parties.

7.8 Flash Three-Way Call

Flash Three-Way Call allows you to connect three calls in a conference call at a phone without conferencing functionality.

To do so:

1. While engaged in a call: Press flash-hook on phone. The initial call is held.
2. Enter the complete phone number or extension of the third party.
3. When the call is connected, press flash-hook again. All parties are connected in a three-way call.
4. To drop the add-on party, press flash-hook again.

***Note: If either of the two parties hangs up, your call with the remaining party is intact. If you hang up, the other two parties remain connected.**

7.9 CommPilot Call Manager

CommPilot Call Manager is a web based tool that allows users to place and receive calls through a web interface. It provides basic and enhanced call processing and functionality. CommPilot Call Manager allows users to control calls (with call functions such as hold, transfer, and conference), via a familiar web page. Using Call Manager you can initiate, answer, hold, transfer and conference calls with the click of a few buttons. Call Manager also provides calling information such as call status, caller ID, speed dial phone lists, Do Not Disturb, Call Forwarding, and Remote Office indicators.

*The following features are included with the **CommPilot Call Manager**:

7.9.1 Click-to-Dial

Enables user to input and dial a number, dial directly from a drop-down Phone list (Personal, Group or Call Log) or Outlook tab, or simply click the Redial button.

7.9.2 Answer Call

Enables user who is already engaged in a call to answer another waiting call. When available, Calling Line ID is displayed with caller's name and number.

7.9.3 Call Hold/Retrieve

Enables user to place an existing call on hold for an extended period of time, and then retrieve the call to resume conversation. While the calling party is held, the user may choose to make a consultation call to another party.

7.9.4 Call Transfer

Enables user to redirect a ringing, active, or held call to another number or directly to voice mail. Before transferring the caller, the user may choose to consult with the third party first or establish a three-way consultation.

7.9.5 Conference

Enables user to join three callers in a conference call.

7.9.6 Release Call

Enables user to disconnect a call that has been answered.

7.9.7 Configure Services

Buttons are provided to enable user to turn on/off frequently used services such as Call Forwarding Always and Do Not Disturb. Alternatively, if CommPilot Express has been configured, the user may change their CommPilot Express Status by choosing from a drop-down menu.

7.10 CommPilot Call Manager Tasks

7.10.1 Use System Buttons

Use the system buttons to access Call Manager system features. These include:

- **Support:** Use Support to open a new email message to report a problem with Call Manager to Customer Support.
- **Help:** Use Help to access context-sensitive help.
- **Configure:** Use configure to access your CommPilot Personal Web Portal.

7.10.2 Select Service Status

Click the button beside the indicator that reflects your service status. Click on a service status link to display the page for that service in a separate browser window.

- **DND:** Do Not Disturb
- **CFA:** Call Forwarding Always
- **RO:** Remote Office

7.10.3 Set Profile

The CommPilot Express personal profiles are displayed in a drop-down list, allowing incoming call management to be customized and referenced easily.

1. Click the drop-down arrow beside the profile: prompt to display the CommPilot Express options: Available: In Office, Available: Out of Office, Busy, Unavailable, or None.
2. Incoming Calls are handled as specified on the CommPilot Express service configuration page.

7.10.4 Enter Phone Number

Phone numbers are selected or entered using your keyboard in the Enter Phone Number text box:

1. To enter a number via the keyboard, click in the text box and type the complete number on your keyboard. This text box accepts numbers, not names.
2. Click the **Personal**, **Group**, or **Outlook** tab to display a list of names or numbers. Click a phone number to populate the **Enter Phone Number** text box.

***Note: Phone numbers can be selected directly from one of the lists, entered from the keyboard, or can be dialed on the telephone. Numbers in the Personal, Group, Call Log, or Outlook Contacts listings may require editing to include, for example, a country code for long distance calls.**

7.10.5 Call Control Buttons

Actions using the **DIAL**, **TRANSFER**, **TALK**, **HOLD**, and **HANG UP** buttons only can be performed on either an active or selected call.

The **CONFERENCE** button places two calls displayed in the call area into a conference where you and those two parties can talk to each other.

For use of the **DIAL** and **TRANSFER** buttons, a phone number must display in the **Enter Phone Number** box (either by typing in a number or by making a selection from the Group, Personal, Call Log, or Outlook Contacts phone lists).

7.10.6 Initiate a Call

1. Click on the **Personal**, **Group**, or **Outlook** tab.
2. Click to select the phone number or name from the list.

OR

1. Type a number in the **Enter Phone Number** box.
2. Click **Dial**.

*For initial calls, the phone rings and then rings the called party after the handset is lifted. When making a second call, clicking the **DIAL** button automatically holds the existing call.

7.10.7 Redial a Number

1. Click **Redial** to dial the last number dialed.

If there are no other active calls, the phone rings, then rings the called party after the handset is lifted. When making a second call, clicking the **Redial** button automatically holds the existing call. The **Enter Phone Number** box does not populate with the last dialed number.

***Note: The Redial button is inactive if this service is not assigned.**

7.10.8 Answer an Incoming Call while Call in Progress

1. The telephone handset must be picked up on the initial incoming call.
2. In display area, click to highlight the call to answer.
3. Click **Talk**. The existing call is placed on hold automatically.
4. Select the holding call and click **Talk** again to return to the initial. The existing call is placed on hold automatically.

Hold a Call

1. With a call highlighted in the call control area, Click **Hold**.
2. Click **Talk** to return to call.

7.10.97.10.10 Take a Call Off Hold

1. In the call control area, click on the call that is to be removed from **Hold**.
2. Click **Talk**.

***Note: If one call is in progress when one is answered, the first is held automatically.**

7.10.10 7.10.11 Blind Transfer

1. In the call control area, click on the call that is to be transferred.
2. Select or enter a phone number.
3. Click Transfer.

7.10.11 7.10.12 Transfer a Call

1. In the call control area, click the call to be transferred.
2. Click **Hold**.
3. Select or enter a phone number.
4. Click **Dial**.
5. Consult with the active call.
6. Click **Transfer** (with no number specified in the Enter Phone Number box).
7. Two existing calls are connected. At this point, the calls disappear from the call control area because you are no longer a participant in the call.

7.10.12 7.10.13 Three-Way Conference

1. Answer or initiate the first call.
2. Initiate the second call.
3. When **Dial** is clicked, the first call is placed on hold automatically.
4. Click **Conference**.
5. All calls are connected.
6. To release one party of the conference call, select the call in the call control area and click **Hang Up**.

7.10.13 7.10.14 End a Call

1. In the call control area, click to highlight the call to be ended.
2. Click **Hang Up**.
3. If all calls have been released, the telephone handset must be replaced before initiating another call.

7.10.14 7.10.15 Send a Call to Voice Mail

While the phone is ringing and the calling number and/or name are displayed, the call can be directed to the Voice Messaging service. The caller hears the Voice Messaging No Answer greeting, and is not aware that the call was forwarded to Voice Messaging without answering.

1. In the call control area, click to highlight the call to send.
2. To send the call to your own voice-messaging mailbox, click **Send to VM**.
3. To send the call to the Voice Messaging mailbox of another user in your group, type that extension in the **Enter Phone Number** text box and click **Send to VM**.

***Note: The Voice Messaging service must be assigned for this button to be active.**

7.11 CommPilot Call Manager Tabs

7.11.1 Group

The **Group** tab displays a list of all users in your business group, and is generated automatically by the addition of members to your group. Text files of names and phone numbers can be added to this Group phone list using the import feature (group administrator only). The list also serves as a searchable company directory, listing names, numbers and email addresses. Use the Summary and Detail buttons to open new browser windows with complete phone lists for printing.

7.11.2 Personal

The **Personal** tab is used to create and edit personal lists. You can create your own list of frequently called numbers. Text files of names and phone numbers can be loaded to this Personal phone list using the import feature, and the list can be searched.

7.11.37.11.3 Preferences

The **Preferences** tab allows you to configure General or Outlook options for use with your CommPilot Call Manager.

The General area allows you to make several system-wide decisions for incoming and outgoing calls.

- Check the **Use One-Click Dialing** option to dial a number automatically when clicked in any tab, such as **PERSONAL** or **OUTLOOK**. If this option is not checked, you must click the number in a list, then click the **DIAL** button. Users who must enter a country code before long distance numbers should NOT check this option, as a country code must be manually entered.

- Check the **Enable Web Screen Pop on calls** option to bring up a specific web page when any call is received. The web page pop URL is required if this option is selected. The web page specified in the **Web Screen Pop URL** text box is automatically accessed in a new browser window for all incoming calls. The calling number may be connected to a database of clients, for example, and pertinent account information can be accessed instantly. Please note that this service only opens the specified web page. All contact database or other call-specific information must be programmed by you.

7.11.47.11.4 Outlook

The **Outlook** tab displays names in your Microsoft Outlook contacts database. However, you must first integrate Outlook with your CommPilot Call Manager to use this feature.

Click on the **OUTLOOK** tab to open or close your Outlook contacts listing. The listing shows the Name/Company, and Business, Home, and Mobile phone numbers in your Outlook contact file. If you have not been assigned the Outlook Contacts service, the tab is shaded.

If there are changes you are certain should be shown in this listing but are not, click **Refresh**.

7.11.4.1 Open Outlook Contacts

1. Click on the **Outlook** tab at the bottom of the **CommPilot Call Manager** page.
2. Your **Outlook Contacts** page displays.

7.11.4.2 Search for Contact

1. Use the scroll bar to find the desired contact
2. You may have to make your search more definite by searching by name or company.
3. Look for the contact by entering his/ her name in the **Search Contacts** box.
4. Click **Search**.
5. If you click on the contact's name, their Outlook file card (vCard) displays. If you have more than one person with the same name in your Outlook contacts, each person's name displays as a result of your search. The same applies for company names.

7.11.4.3 Dial a Number

1. Click on the phone number to be dialed.
2. The number displays in the **Enter Phone Number** box.
3. Click **Dial**.
4. The contact's phone is dialed.

7.11.4.4 View Contact's vCard

1. Click on the contact's name or company name.

The card may include the contact's job title, addresses, phone numbers, and e-mail and web site addresses.

You also can click the card icon beside a caller or called party's name in the **CommPilot Call Manager** window when a call is placed or received.

Using the **Search by Name** or **Search by Company** features, you can access anyone in your Outlook database. Outlook allows you to make decisions regarding the Outlook Integration feature.

***Note: If the Outlook Integration service is not assigned, this tab is not active.**

7.11.4.5 Open Journal Entry for Incoming Call

1. Click the **Preferences** tab.
2. Click the **Open Journal Entry on an Incoming Call** option to automatically open the Microsoft Outlook journal entry for the calling party.
3. The following information is automatically populated:
 - **Entry Type:** Phone Call.
 - **Company:** Company name from the v-Card of the incoming call, if available. If the Company name is not available, the information is left empty.
 - **Subject:** "Received Call from <number> [<name if available>]".
 - **Contacts:** If available, the other party's v-card is associated. Otherwise, this information is empty.

***Note: The timer on the journal entry is started.**

4. You can then save this entry in Outlook, or cancel this journal entry. This entry is saved in the Outlook default journal folder.

***Note: The entry timer stops automatically when the entry is saved and closed. It can also be paused using the Pause Timer button available on the journal entry.**

7.11.4.6 Open Journal Entry for Outgoing Call

1. Click the **Preferences** tab.
 2. Click the **Open Journal Entry on an Outgoing Call** option to automatically open the Microsoft Outlook Journal for the dialed number.
 3. The following information is populated automatically:
 - **Entry Type:** Phone Call.
 - **Company:** Company name from the v-Card of the outgoing call, if available. If the company name is not available, the field is left empty.
 - **Subject:** "Placed Call to <number> [<name if available>]".
 - **Contacts:** If available, the other party's v-card is associated. Otherwise, this information is empty.
- *Note: The timer on the journal entry is started.**
4. You can then save this entry in Outlook, or cancel this journal entry. This entry is saved in the Outlook default journal folder.

7.12 Outlook Integration

Outlook Integration enables you to integrate your personal contacts in Microsoft Outlook with your CommPilot Call Manager. Using the **Outlook Contacts** tab in the CommPilot Call Manager, you can perform a search of your personal Outlook contacts by name or company. Once the desired contact is located, you may click-to-dial one of the contact's phone numbers, or may choose to display the contact's **vCard** by clicking on the name.

When receiving a call, your Microsoft Outlook contact database is searched for a match of the caller's phone number. If the number matches, the icon next to the incoming calling name is highlighted and rolling the mouse over it gives the caller's name. In addition, you have the option to click the icon to open the caller's vCard. You can have new Outlook journal entries automatically opened for incoming and/or outgoing calls.

You can choose to turn it off if you are at a remote location using your Call Manager but do not have access to your Outlook. The contact retrieval option allows you to only retrieve contacts from your default contact folder for performance reasons.

7.12.1 View, Dial and Add Names/Numbers in Contact List

1. Click **Tab** to expose **Outlook Contacts**; Click again to close
2. Click phone number to populate **Enter Phone Number** text box.
3. Click **name** in list or **Card Icon** in **Call Control Area** to show v-card of contact. Called or calling parties with v-cards have Card Icon to left of name in Call Control Area.
4. Click **Refresh** to expose newly entered contacts.
5. Use scroll bar to view up to 25 contacts. Contacts not displayed must be searched for, or use the First Page, Previous, Next, and Last Page buttons.

***Note: Upon initial use of Outlook Contacts list, click Yes in security warning dialog box to install and run Broadsoft component permitting access to Outlook Contacts.**

From your CommPilot Call Manager, click on the **OUTLOOK** tab to open and close the listing. If there are changes you are certain should be shown in this listing but are not, click the **Refresh** button.

***Note: When the CommPilot Call Manager page is opened, an alert box appears asking if a software component can be downloaded, which enables Outlook Integration. Click OK to allow download and installation. (This may take a few minutes.) The CommPilot window displays upon completion. (You may be instructed to reboot your PC in order for the changes to take effect.) If you click NO, you do not have an Outlook list to view. Clicking NO may cause scripting errors. Until you download the necessary components, the alert box appears each time CommPilot is opened.**

7.12.2 Start Outlook Integration

1. When your CommPilot Call Manager is opened, an alert box displays asking if a software component can be downloaded, which enables Outlook Integration.
2. Click **OK** to allow the download and installation.
3. Reboot your computer: The CommPilot window displays upon completion.

7.12.3 Enable/ Disable Outlook Integration

1. Click **On** or **Off**.
2. Define contact retrieval based on one of the following:
 - Click **Retrieve Contacts from Default Contact Folder Only** to filter the contacts based on your default folder.
 - Click **Retrieve All Contacts** to include the contacts from all contact folders.
3. Save your changes. Click **Apply** or **OK**.

7.13 Remote Office

Enables users to access and use their CommPilot service from any end point, on-net or off-net (home, office, mobile phone). This service enables workers to use all of their CommPilot features while working remotely (extension dialing, transfers, conference calls, Outlook Integration, Directories). This feature must be set up by group administrator.

You use this page to control your call management services from another phone. **Remote Office (RO)** allows you set another phone to act as your desk phone. Other phones, for example, can include a mobile phone or hotel room phone.

You can access this page by clicking the **RO** link on your **CommPilot Call Manager** window. When the button to the left of the **RO** link on the CommPilot Call Manager is selected, this service is on. When it is not selected, it is Off.

7.13.1 Activate Remote Office

1. Click **On** or **Off**. When **On**, the phone number indicated becomes your primary phone, allowing you to dial and receive calls displayed on your web browser. When **Off**, your normal office phone is your primary phone.
2. Confirm or enter **Remote Phone Number**: Type the phone number of the phone to at as your office phone.
3. Save your changes. Click **OK**.

7.14 Shared Call Appearance

Shared Call Appearance allows administrators to allocate additional devices or lines to you. These devices or lines also ring just like your primary phone. Users can have their incoming calls ring on up to three phones simultaneously, connecting the first phone to be answered. Once you are on a call, however, only that device or line can be used. You cannot add or remove these devices or lines. If you need assistance, contact your administrator.

7.14.1 Display a List of Selected Devices or Lines

1. From the first drop-down list, select **Device Type, Device Name, or Line/ Port**.
2. From the second drop-down list, select the condition (**Starts With, Contains, Equal To**).
3. Type a search string into the text box.
4. Click **Find**.
5. Click **OK** to exit this page.

7.14.2 Display a List of All Devices or Lines Assigned to You

1. Click **Find All**.
2. Click **OK** to exit this page.

8 Messaging

8.1 Aliases

Messaging Aliases allow you to enter numbers that when calling your voice messaging box, they act as if you called from your office phone.

8.1.1 Add an Alias

1. Click the **Add** button. The **Alias Add** page is displayed.

8.1.2 Delete an Alias

1. Check the **Delete** box next to the entry to delete.
2. Save your changes. Click **Apply** or **OK**. **Apply** saves your changes. **OK** saves your changes and displays the previous page.

***Note: This action cannot be undone. Once you click Apply or OK, the alias is permanently deleted.**

8.2 Distribution Lists

You use this page to add, modify, or delete distribution lists. These distribution lists are used in your voice portal (the telephone interface) when composing a new message and when replying to or forwarding existing messages.

You can configure up to 10 distribution lists. The distribution lists are numbered from 0 to 9, and this number corresponds to the key that you must use in the voice portal to use a given list. Using this page, you can:

- **Create** a distribution list; **Add** a phone number to a distribution list; **Delete** a phone number from a distribution list.

8.2.1 To Create a Distribution List

1. Select the distribution list you wish to configure by clicking on one of the 10 tabs (called List 0 through List 9) near the top of the window. Each list can be configured independently.
2. In the **Description** text box, type a name for the list.
3. Click **Apply**.

8.2.2 To Add a Phone Number to a Distribution List

1. Click on the tab for the list.
2. In the **Phone Number** text box, type the phone number to add.
3. Click **Add**.
4. Save your changes. Click **Apply** or **OK**. **Apply** saves your changes. **OK** saves your changes and displays the previous page.
5. To exit without saving, select another page or click **Cancel** to display the previous page.

8.2.3 To Delete a Phone Number from a Distribution List

1. Click on the tab of the list.
2. Check the **Delete** box next to the entry to delete.
3. Click **Delete**.

***Note: This action cannot be undone. Once you click Delete, the number is permanently deleted from the list.**

8.3 Greetings

You use this page to set your voice message greetings that callers hear when they get either a busy tone or no answer when they call you. Your greeting can be a generic system recording or a personalized recording. You can also record your voice message greetings using the voice portal on your phone.

***Note: Other services, such as Call Forwarding No Answer, share this setting, and if it is changed in one service, that change affects all other services using this value.**

***Note: If a mobile phone is used for the Simultaneous Ring service, the number of rings before the Voice Messaging service answers your phone should be set to more than three rings. Some mobile phones have slower location and connection services, which may delay the Simultaneous Ring to the mobile phone from occurring before answer of the Voice Messaging service.**

8.4 Set your Busy Greeting

1. Select whether you want callers to hear the default system greeting or a personal greeting.
2. If you choose **System greeting**, callers hear the system's standard greeting when your phone is busy.
3. If you chose **Personal greeting**, type the path and file name of a .WAV file with your greeting or click Browse.
4. Browse your local computer for a previously saved greeting (.WAV file) or record a new greeting.
5. After this file has been selected, it displays in the **Load personal greeting** box.

8.5 Set your No Answer Greeting

1. Select whether you want callers to hear the default system greeting or a personal greeting.
2. If you choose **System greeting**, callers hear the system's standard greeting when you do not answer your phone.
3. If you chose an **Unavailable Greeting**, type the path and file name of a .WAV file with your greeting or click Browse.
4. Browse your local computer for a previously saved greeting (.WAV file) or record your own. After this file has been selected, it displays in the **Load Unavailable Greeting** box.

5. If desired, select up to three alternate greetings. Alternate greetings are available only for the No Answer feature.
6. Browse your local computer for up to three alternate greetings that you would like to use. After the file has been selected, it displays in the **Load Alternate Greeting box**. Provide a name for it in the **Greeting Name** box.
7. Click the button to pick your preferred greeting. When one of these greetings has been chosen, the button disappears from the **System greeting or Unavailable Greeting**, because only one greeting can be selected.
8. Set the number of rings callers hear before your greeting plays. Click the appropriate button to indicate the number of times you want your phone to ring before callers are directed to your voice messaging.
9. Save your changes. Click **Apply** or **OK**. Apply saves your changes. OK saves your changes and displays the previous page.

8.6 Personalized Name

Enables users to record their name to be played back to incoming callers in conjunction with multiple services, including Voice Messaging and Auto Attendant. A .WAV file is recorded and uploaded via phone and respective CommPilot Personal web screen.

8.6.1 Activate or Deactivate the Service

1. Check the box to use a personalized name recording with Auto Attendant and Voice Messaging.

If this service has been turned on:

1. Load the file with your recorded name:
2. If you already have recorded a name announcement, type the full path name in the **Load Name** text box, or click **Browse** to locate it.

8.6.2 Use your Phone to Record your Announcement

1. Dial the voice portal phone number and provide your extension and/or passcode when prompted. Follow the instructions for name recording.
2. Save your changes. Click **Apply** or **OK**. Apply saves your changes. **OK** saves your changes and displays the previous page.

8.7 Voice Management

Voice Management allows you to specify recorded messages for callers when the user's phone is busy and/pr when you do not answer.

8.7.1 Voice Messaging

1. To turn your voice messaging service on, click "**On.**" To turn voice messaging off, click "**Off.**"

8.7.2 When a Voice Message Arrives...

1. If you want to retrieve voice messages using your phone and your e-mail account, select **Use Unified Messaging**.
2. If you see the **Advanced Settings (Also saves current page data)** link, click on it to configure your Voice Mail Server and Account settings. Otherwise, the advanced settings are managed by your group administrator.
3. When using unified messaging, you can check the **Use Phone Message Waiting Indicator** box. This option provides a stuttered dial tone (and blinking light on some phones) to inform you when you have messages waiting.
4. If you always listen to your voice messages using your e-mail account and do not use the phone retrieval option, select **Forward it to this e-mail address:** and provide the e-mail address where you want your voice messages to be sent.

8.7.3 Email Notification

1. If a check mark appears in the **Notify me by e-mail of the new voice message at this address at:** box, a short e-mail message informing you about the new caller and date/time of the message is sent.
2. In the text box, type the e-mail address where you want these notifications to be sent.

8.7.4 Carbon Copy of Message

1. If you want a carbon copy of your messages to be sent to another e-mail address, check the **E-mail a carbon copy of the voice message to:** box, and provide the e-mail address where you want the copy to be sent.

8.7.5 Transfer Caller Option

1. If a check mark appears in the **Transfer on '0' to Phone Number:** box, callers can press 0 during your outgoing voice message and be transferred to another number, such as a mobile phone or Auto Attendant.
2. If a caller presses 0 while recording a message, the recording is aborted, no message is left and the caller is transferred.
3. Save your changes. Click **OK**.

8.8 Voice Portal

Enables users to make calls from the voice portal as if making calls from their desk. You can access your personal voice portal using your own phone or another phone. To log in, you dial one of the following:

- **Your phone number/ extension**
- **Group voice portal number/ extension**
- **Enterprise voice portal number/ extension**

Your administrator provides you with the phone number/ extension for the group voice portals.

8.8.1 Log in with the Voice Portal Wizard

1. Dial your phone number/ extension or the voice portal number then,
2. If requested, enter your phone number
3. Enter a new passcode at the prompt
4. Re-enter your passcode at the prompt
5. Record your name at the prompt
6. Press #

***Dial the voice portal phone number, then:**

8.8.2 From Your Own Phone

1. Enter correct passcode to reach the Voice Messaging main menu
2. At Voice Messaging menu, press * to reach the Voice Portal main menu.

***Dial the voice portal phone number, then:**

8.8.3 From a phone other than your own

1. Press * during your outgoing greeting to reach the login prompt.
2. Enter correct passcode to reach the Voice Messaging main menu.
3. At Voice Messaging menu, press* to reach the Voice Portal main menu.

8.8.4 From your own phone

Enter correct passcode to reach Voice Portal main menu.

8.8.5 From a phone in your group other than your own

1. Press * during the greeting to reach Voice Portal login prompt.
2. Enter your phone number
3. Enter correct passcode to reach Voice Portal main menu

8.8.6 From a phone outside of your group

1. Enter your phone number
2. Enter correct passcode to reach Voice Portal main menu.

8.8.6.1 Leaving Messages for Other Users

During Greeting:

- # interrupt greeting and start recording voice message
- * transfer out of greeting to Voice Portal password prompt
- 0 transfer out of greeting to configured number

8.8.6.2 While Recording Message

- * Cancel recording and transfer to voice portal password prompt
- 0 Cancel recording and transfer to configured number
- # Stop recording and review message

8.8.6.3 Review Message

- 1 Erase message and record again
- 2 Listen to current message
- 3 OR hang up to send message
- 6 Set or Clear the urgent indicator
- 7 Set or clear the confidential indicator
- * Cancel recording and transfer to Voice Portal password prompt
- 0 Cancel recording and transfer to configured number
- # Repeat menu

8.9 Voice Portal Main Menu

- 1. Access voice messaging
- 2. Change CommPilot Express Profile
- 3. Record Personalized Name
- 4. Change Call Forwarding Options
- 6 Make Calls
- 8 Change Passcode
- 9 Exit
- # Repeat Main Menu

9 Utilities

9.1 Feature Access Codes

To perform the functions listed in the Feature Access Code section, dial the prefix (or the alternate prefix) followed by the two-digit feature code. You can activate and deactivate any of these services by dialing one of the allowed prefixes followed by the assigned two-digit code.

*8	Automatic Callback Deactivation deactivates all current Automatic Callback sessions.
*72	Call Forwarding Always Activation redirects your incoming phone calls to another number, such as a mobile phone or administrative assistant. After dialing an allowed prefix and the assigned code, dial the phone number where you want your calls to be redirected.
*73	Call Forwarding Always Deactivation terminates the Call Forwarding Always service. Upon deactivation, your calls ring on your phone unless you have set up another service such as Call Forwarding Busy, Call Forwarding No Answer, or Do Not Disturb.
*90	Call Forwarding Busy Activation redirects your incoming phone calls to another number, such as a mobile phone or administrative assistant, when you are on the phone. After dialing an allowed prefix and the assigned code, dial the phone number where you want your calls to be redirected.
*91	Call Forwarding Busy Deactivation terminates the Call Forwarding Busy service. Upon the deactivation, your calls ring on your phone unless you have set up another service such as Call Forwarding Always, Call Forwarding No Answer, or Do Not Disturb.
*92	Call Forwarding No Answer Activation redirects your incoming phone calls to another number, such as a mobile phone or administrative assistant, when you do not answer your phone. After dialing an allowed prefix and the assigned code, dial the phone number where you want your calls to be redirected.
*93	Call Forwarding No Answer Deactivation terminates the Call Forwarding No Answer service. Upon deactivation, your calls ring on your phone unless you have set up another service such as Call Forwarding Busy, Call Forwarding
*67	Calling Line ID Delivery Blocking per Call hides your calling line ID on a per call basis. Before placing a call, dial an allowed prefix followed by the assigned code, then place your call as usual. Note that this service is only active for one phone call.
*65	Calling Line ID Delivery per Call displays your calling line ID on a per call basis. Before placing a call, dial an allowed prefix followed by the assigned code, then place your call as usual. Note that this service is only active for one phone call.
*68	Call Park places a call on hold with the intent of retrieving it from another extension. The call can be parked on your own extension or another within your group.
*88	Call Park Retrieve picks up a call that has been parked.

*9	Call Pickup picks up a call within your assigned group. You cannot pick up calls outside your business group. The extensions within your business group can be viewed on the CommPilot Call Manager or in your Group list. The Call Pickup group to which you belong is determined by the group administrator and may or may not consist of those members listed in your Group phone list. When you dial the Call Pickup code, you answer the ringing phone in your group. If more than one phone is ringing, you answer the phone that has been ringing the longest.
*69	Call Return returns a call to the phone number of the last call you received. You are only allowed to return calls to numbers that are acceptable according to your Outgoing Plan.
*70	Cancel Call Waiting turns off the Call Waiting service for the next call you place.
*99	Clear Voice Message Waiting Indicator clears the audible (and visible for some devices) message-waiting indicator on your phone.
*57	Customer Originated Trace places a trace on the last number that called you.
*55	Direct Voice Mail Transfer transfers a held call to your voice mail.
*97	Directed Call Pickup dials an allowed prefix, followed by the assigned code and an extension to pick up a ringing call in your group. You can pick up any call in your group as long as it has not been answered.
*33	Directed Call Pickup with Barge-in picks up a ringing call in your group or to join an ongoing call with someone in your group.
*78	Do Not Disturb Activation activates the Do Not Disturb service. When Do Not Disturb is active, your phone does not ring and all calls go directly to "busy treatment", such as Voice Messaging.
*79	Do Not Disturb Deactivation turns off the Do Not Disturb service.
*22	Flash Call Hold places a call on hold with the flash button or the hang up button. Flash the phone to toggle between the calls.
*66	Last Number Redial dials the most recently dialed phone number called from your extension.
*71	Per Call Account Code charges a call to the account number.
*75	Speed Dial 100 calls the two-digit speed dial number of the party you want to call.
*74	Speed Dial 8 calls the two-digit speed dial number of the party you want to call.
*47	Sustained Authorization Code Activation (calls unlocking) unlocks your calls.
*37	Sustained Authorization Code Deactivation (calls locking) locks your calls.