

Hosted Phone System Guide

POLYCOM
Admin Version



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COMMPORTAL MANAGEMENT

Access the CommPortal at <https://commportal.wabash.com>. Then log in using your given credentials.

MaX UC App (Premium Attendant Only)

To download the MaX UC app to your computer, in the CommPortal:

1. Near the bottom of the page under support, select *Downloads*
2. Select *On your Computer*
3. Select *OK*
4. Follow the on-screen instructions, using your credentials

Announcements

You must be logged in as the Administrator using <https://commportal.wabash.com/bg>

There are two ways to add or change announcements/recordings.

- Using a Headset or Microphone

1. In the CommPortal, select *Attendants* on the left side
2. Select either *Easy* or *Premium Attendants*
3. Select *Open in New Window*
4. Select *Announcements*
 - i. Add new Announcement
 - ii. Name your recording
 - iii. Record your announcement
 - iv. Save
 - v. Add

- Using a Handset

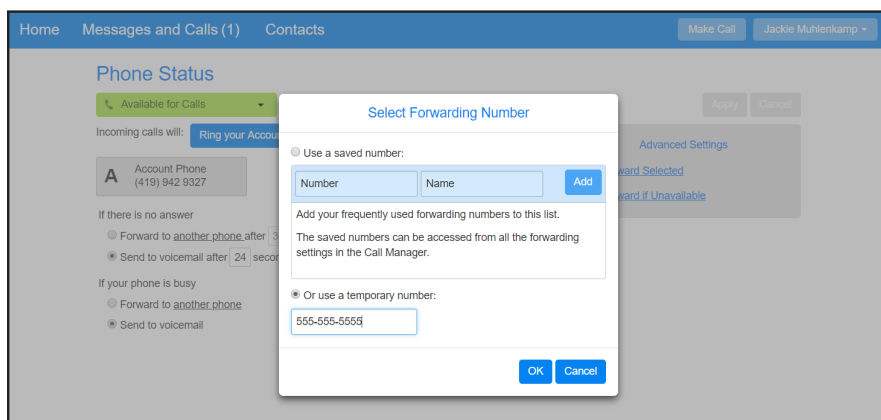
1. Dial your Auto Attendant number
2. Dial *6 (ignore the active/inactive message)
3. Enter the pin number
4. Follow the prompts to record
5. Go to the CommPortal to set

Call History

To view your call history in the CommPortal:

1. Select *Messages and Calls* from the top of the page
2. Toggle between the options to view the history

*To view your call history from your desk phone, please see the Call History topic in the Using Your Phone section.



Forward Calls

To forward calls to another phone instead of voicemail, follow these steps in the CommPortal:

1. On the main screen, under *If there is no answer*, select the button next to *Forward to another phone*
2. Select another phone
3. Add the number you would like the call to forward to, then select **OK**

Hunt Groups | Change Rotation (Admin Only)

To change the rotation of the calls in the hunt group, follow these steps in the CommPortal:

1. After logging into the CommPortal, select *Hunt Groups* on the left
2. Select the hunt group you would like to adjust

A screenshot of the CommPortal interface showing the 'Hunt Groups in Department' screen. The left sidebar has a blue header with 'Home' and 'Groups'. Under 'Groups', there are links for 'Hunt Groups (MLHGs)', 'Call Pickup Groups', and 'Supervisor Dashboard'. The main content area is titled 'Hunt Groups in Department:' with a 'View All' dropdown. Below the title is a paragraph explaining that a Hunt Group (MLHG or Multi-Line Hunt Group) is a set of lines within a Business Group, and calls are passed to a non-busy member. Below this is a 'Move selected to:' section with a 'Select department' dropdown and a 'Move' button. At the bottom is a table with the following data:

<input type="checkbox"/>	Hunt Group Name	Number of Members	Service Level	Department
<input type="checkbox"/>	CSR	7	Premium ACD	CSR
<input type="checkbox"/>	Dispatcher	8	Basic ACD	None
<input type="checkbox"/>	NetworkTech	5	Basic ACD	Network

3. Select *Settings*

4. Select *Hunt Settings* to change the following:

- Call Distribution Algorithm
 - Linear
 - Circular
 - Uniform (Round robin): Randomly chooses who will receive the call
 - Uniform (Longest idle): Will ring the person who has been off of the phone the longest
 - Ring all: All calls will ring in the hunt group
- Ring Each Member for (Sec)
 - Adjust the amount of time for the call to ring each person before moving to the next

Hunt Groups | Log In or Out

If a user is part of a hunt group, they are able to change their status to log in or out of the group.

1. After logging into the CommPortal, select *Groups*
2. Within the group, change your status to *Login* or *Logout*

*Users can see other users status on this screen.

*Admin users can access all CommPortal user accounts to change their status.

Intercom | Automatic Answer

The automatic answer setting determines whether the phone may answer certain types of calls, (usually this is used for intercom calls). To change this setting, follow these steps:

1. After logging into the CommPortal, select *Devices* at the bottom left
2. Select *Set Keys*
3. Below the image of the desk phone, select *Edit*
4. Select *User* and then *Call Services*
5. Change the Automatic Answer radio button to *No* to turn off auto answering, or *Yes* to turn on

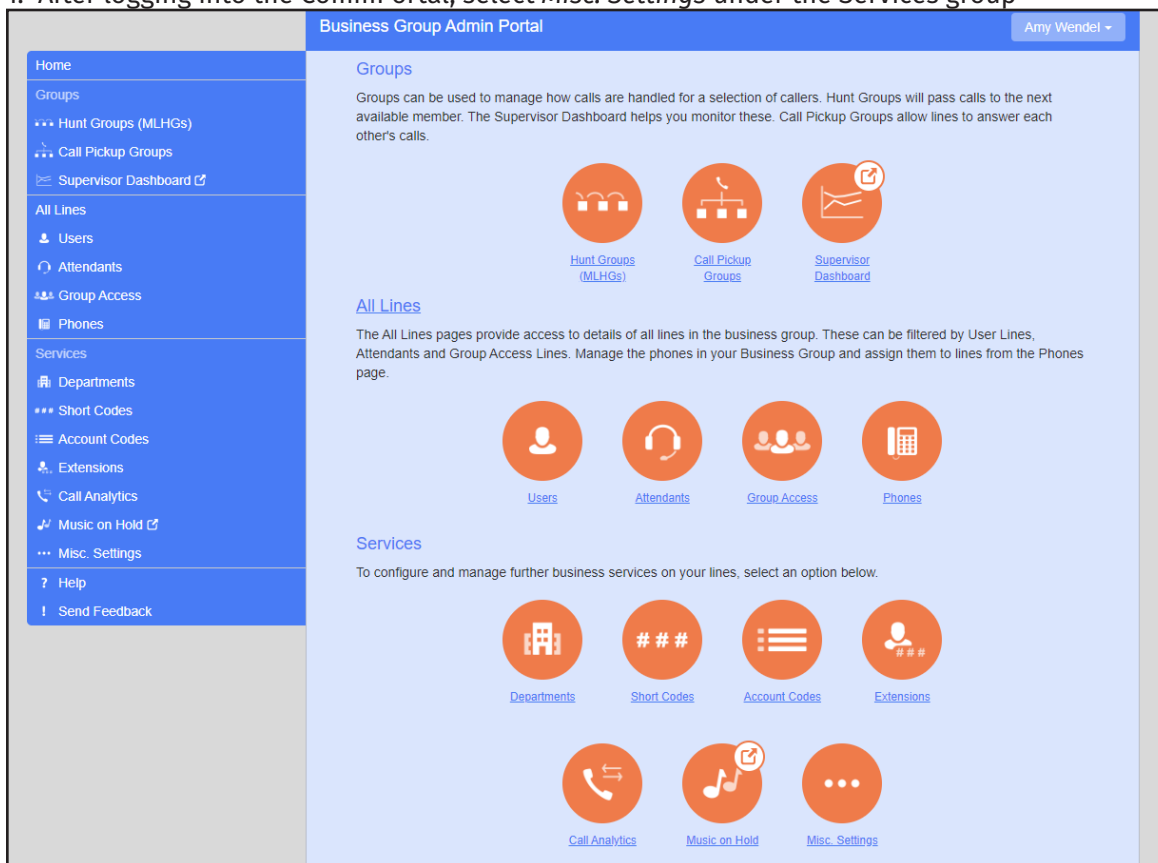
6. Select *Save Changes*

Kari's Law (9-1-1) (Admin Only)

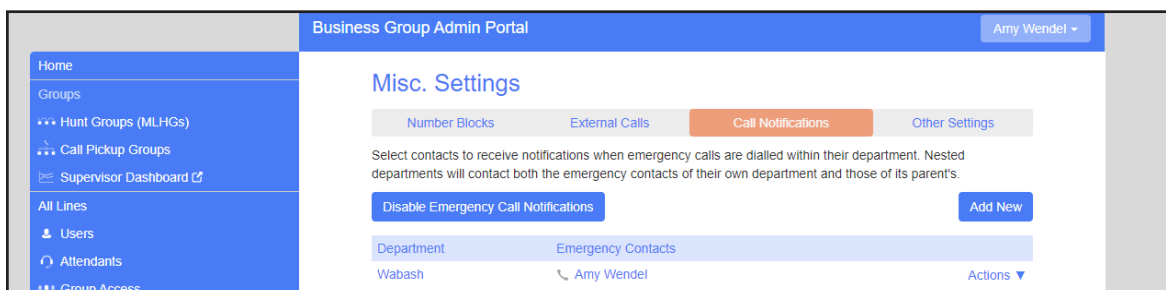
Kari's Law is legislation in the United States that requires multi-line telephone systems to route 9-1-1 emergency service calls through the phone systems automatically. Kari's Law mandates that the electronics and software used in multi-line systems support direct-dial-to-emergency-services, even if the system normally requires the caller to enter an additional digit for an outside line. Under this law, Wabash is subject to alert the front desk line that someone in the building/facility has called 9-1-1. This will also pinpoint the extension that made the phone call.

To update the details, follow these instructions:

1. After logging into the CommPortal, select *Misc. Settings* under the Services group



2. Select Call Notifications



3. Select *Add New*, then add the person(s) that should receive the notifications.
 - Notifications can be by email or by phone

Keys

Each key on your desk phone can be customized to give you quick access to options you use most, including speed dialing. Keys can be changed in your CommPortal.

1. At the bottom of the CommPortal page, select *Devices* from the Personal Details column.
2. A window will pop-up with the devices you are able to edit. Select *set keys*.
3. Select the *Edit* button under the phone you would like to edit.
4. Select Programmable Keys
5. Use the following images to program the keys:

- Inner Company Extension

▼Key 3		Linda	
Soft key action	Enhanced Monitored Extension		Reset
Extension	401		
Use Subscriber Name as Label	<input type="radio"/> Yes - Requires the subscriber's full DN as the extension to monitor		
	<input checked="" type="radio"/> No		
Label	Linda		

- External Number (ie Cell Phone)

- Be sure to add "91" before the 10-digit number, just as you would normally dial.

▼Key 15		Greg W	
Soft key action	Speed Dial		Reset
Number	919375392680		
Label	Greg W		

*Keys will automatically update on your phone's screen.

Missed Call Notification

To disable the "# Missed Calls" notification message on your desk phone:

1. At the bottom of the CommPortal page, select *Devices* from the Personal Details column.
2. A window will pop-up with the devices you are able to edit. Select *set keys*.
3. Select the *Edit* button under the phone you would like to edit.
4. Select *User*
5. Select *Call Services*
6. Find the "Missed call indicator" topic and select *No*.

Music On Hold (Admin Only)

To add or edit music on hold, use the following steps:

1. In the CommPortal, select *Music on hold* on the left side
2. Select *Edit/Add* on the right side

Priority Callers

To set allow specific callers to ring through when on Do Not Disturb (DND), follow these steps.

1. In the CommPortal, change the Phone Status to Do Not Disturb
 2. Select Priority Callers to set numbers that can ring through.
 3. Select Apply to save your changes.
- To answer a call when on DND, select the answer button or your number button (top left on phone).
 - Or answer using MaxUC as normal

The screenshot shows the 'Phone Status' configuration page. At the top, there is a red dropdown menu set to 'Do Not Disturb' with 'Apply' and 'Cancel' buttons to its right. Below this, a grey box contains a red 'X' icon and the text 'Incoming calls will be forwarded to voicemail'. Underneath, a checkbox labeled 'Allow priority callers to ring when in Do Not Disturb' is checked. To the right of this checkbox is an 'Advanced Settings' section with two checked options: 'Forward Selected' and 'Forward If Unavailable'. Below the checkbox, the text 'Incoming calls will:' is followed by a blue button labeled 'Ring your Account Phone'. Underneath this is a box with a large 'A' icon, the text 'Account Phone', and the number '(419) 942 9327'. Further down, there are two sections: 'If there is no answer' and 'If your phone is busy'. Each section has two radio button options. In the 'no answer' section, 'Send to voicemail after 24 seconds' is selected. In the 'phone is busy' section, 'Send to voicemail' is selected.

Schedule Adjustments | Auto Attendant Answer (Premium Attendant Only, Admin Only)

To set or edit the time your phone rings or when the call is answered by the auto attendant (ie. for office hours, holidays, etc.), follow these steps:

1. In the CommPortal, select Attendant on the left
2. Select Premium Attendant
3. A new window will open
4. Select Schedule
5. Adjust the office hours
 - To add the holidays, select Special Days

Below is the screen you will see. The red indicates time when the phone will ring through. The white indicates the call is answered by the auto attendant.

The screenshot shows the 'Line Status' interface with the 'Schedule' tab active. On the left, under 'Periods', 'Business Hours' is selected. Below it, 'All other times' and 'Special Days' are listed. The main area displays a weekly grid from Monday to Sunday. The grid shows red blocks for ringing times and white blocks for auto attendant answers. The 'Business Hours' period is selected, and the menu is set to 'Main'. The grid shows red blocks for ringing times and white blocks for auto attendant answers. The 'Business Hours' period is selected, and the menu is set to 'Main'.

Below is the screen you will see for Special Days. Notice November 23, 24 & 25 and December 24 & 25 are grayed. This indicates the phones will go to auto attendant automatically.

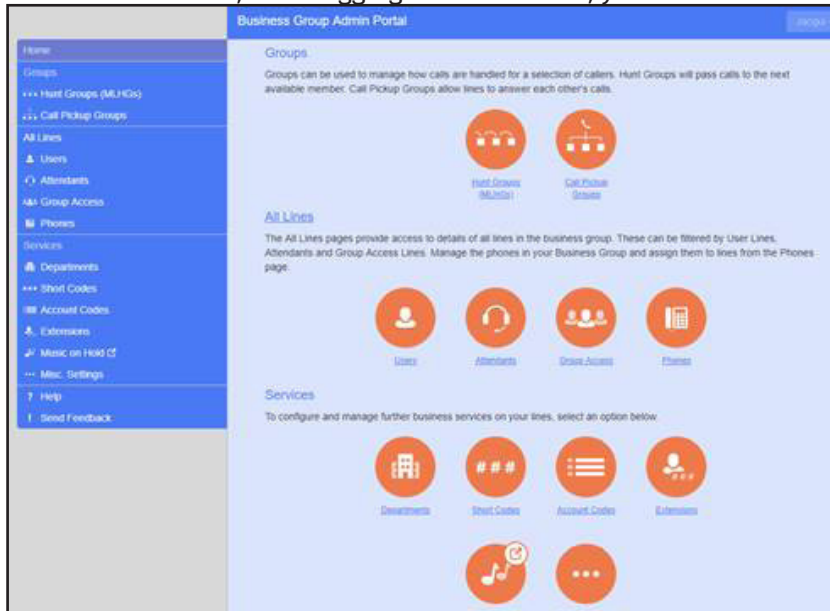
*Note that the calendar week begins on a Monday.

The screenshot shows the 'Line Status' interface with the 'Special Days' tab active. On the left, under 'Periods', 'Special Days' is selected. The main area displays a calendar for November and December 2018. The dates November 23, 24, 25 and December 24, 25 are grayed out, indicating they are special days. The 'After Hours' menu is selected. The calendar shows the following dates: November 1-31 and December 1-31. The dates November 23, 24, 25 and December 24, 25 are grayed out.

Schedule Adjustments | Live Answer (Admin Only)

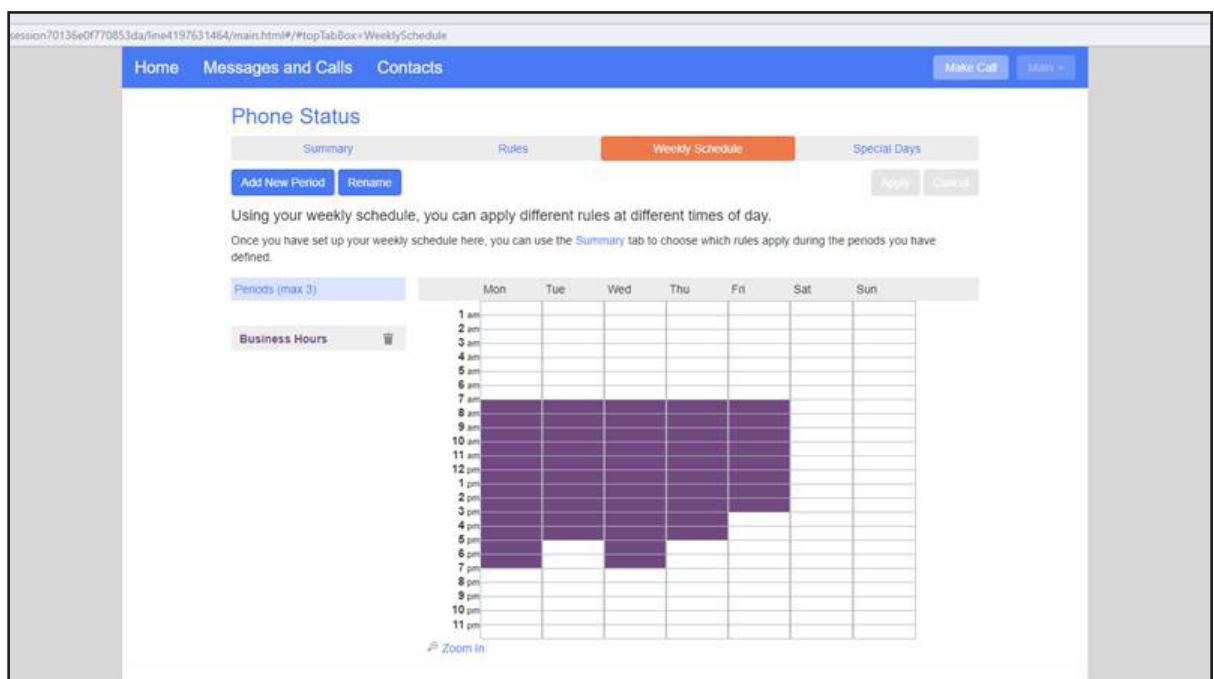
To set or edit the time your phone rings or when the call is answered by the auto attendant (ie. for changed office hours, holidays, etc.), follow these steps:

1. In the CommPortal, after logging in as an admin, you will see this screen:



2. Select Hunt Groups on the left side
3. Select Main Line
4. Select your number near the middle of the page
5. Select Open in a new window
6. Select Weekly Schedule

Below is the screen you will see. The purple indicates when the phone will ring in the office during the selected hours. To add or remove, just select the time area. You can adjust the schedule by 15 minutes if you select the zoom in button.



Speed Dials & Short Codes (Admin Only)

Speed dials and short codes can be added/edited from the CommPortal.

* If you have a lot of these to add, Wabash can import them for you.

1. In the CommPortal, select Short Codes
2. Select Add
 - Short Code is the number you want their speed dial to be
 - Telephone number is the phone number the short code will dial

* The number 9 cannot be used as a speed dial as this is the number used to place an external call.

Voicemail | Greeting

To set up your voicemail greeting, follow these steps:

1. In the CommPortal, select *Message Settings*
2. Select *Voicemail Greeting*
3. Select the type of greeting from the drop down, then select *edit*
4. Here you can record (red circle) or listen to (play button) your greeting
 - To record, you must give CommPortal permission to your microphone, if asked
5. Select *save*

Voicemail greetings can also be setup and changed using your deskphone. See the *Voicemail | Greeting* topic in the Using Your Phone section.

Voicemail | Email Notification

To receive an email notification of a voicemail message, follow these steps:

1. In the CommPortal, select *Notifications*
2. Select *Email*
3. Select the box next to *Send email notification of incoming messages to the following address*
4. Select *New Entry*, and enter the email address you would like to receive voicemail, select *Add*
5. Select the box under *All Voicemail*
6. Select *Apply*

Multiple email addresses can be added by repeating steps 3-6.

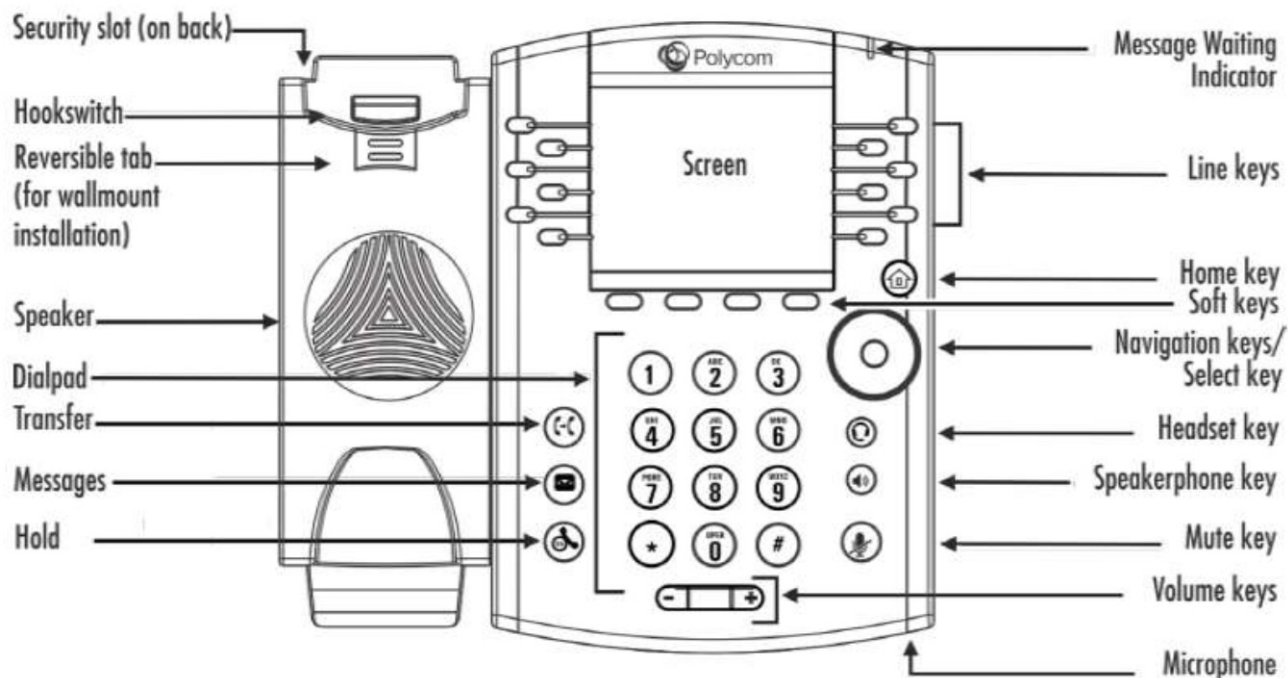
Voicemail | Message to Email

Voicemail messages can be send to an email address as a .wav file. To set up this function:

1. In the CommPortal, select *Message Settings*
2. Under General, select the box next to *Forward messages as emails*
3. Select *add an email address*
4. Enter the email address you would like to receive the voicemail, select *Add*
5. Select *Apply* to save the change

USING YOUR PHONE

Phone Keys & Hardware



Make a Call

To make a call from your desk phone, follow these steps:

- Call an External Number
 - Dial the phone number
 - You may need to select *Dial* to begin the phone call if you do not hear a dial tone.
- Call an Extension
 - Dial the extension number
 - You may need to select *Dial* to begin the phone call if you do not hear a dial tone.
- Call a Speed Dial
 - Select the key on your phone/sidecar

Conference Call

To make a conference call, or add a person to your current call, follow these steps:

1. With one person on the line, select *More*
2. Select *Confrnc* button that appears
3. Enter the extension or phone number, then select *Send*
4. Select *More*, then *Confrnc* and both parties will be on the line

Forward Calls

To forward calls to another phone instead of voicemail, on your desk phone:

- To enable, dial *72 and the number to forward calls to
- To disable, dial *73

Transfer a Call

There are three options of how to transfer a phone call.

- CONSULTIVE: Speak with the requested party before transferring
 1. Select *Transfer*
 2. Enter the Extension or phone number
 3. Select *Send*
 4. After speaking with the dialed party, select *Transfer*
- BLIND: Transfer the call directly to the requested party, Caller ID will show
 1. Select *Transfer*
 2. Select *Blind*
 3. Enter the Extension or phone number
 4. Press *Send*
- VOICEMAIL: Transfer the call directly to the requested party's voicemail
 1. Select *Transfer*
 2. Enter *15 + the Extension or phone number
 3. Select *Send*

Call History

To check your call history on your desk phone, use the Navigation circle:

- Left arrow: Received calls
- Down arrow: Missed calls
- Right arrow: Placed calls

* To view your call history in the CommPortal, please see the Call History topic in the CommPortal section.

Missed Call Notification

If you miss a phone call, a “# Missed Calls” notification message will appear on the top right corner of the screen on your desk phone.

- View Missed Calls
 1. Select the down arrow of the circle navigation key

* This will also remove the “# Missed Calls” notification message

* The “# Missed Calls” notification message can be disabled in the CommPortal. See the Missed Call Notification topic in the CommPortal section.

Voicemail

When you receive a voicemail, a red light will flash on the top right of your desk phone. There are two ways to check your voicemail:

* Voicemail must initially be set up on your phone and you will need to change your pin number.

- Phone Key
 1. Select the envelope “mail” key on your desk phone (left of the number keys)
 2. Enter your pin number
- Dial In
 1. Dial *15
 2. Enter your pin number

To check your voicemail when you are away from your desk, on any phone:

1. Dial 419-942-MAIL (6245) and follow the prompts:
2. Dial the number you want to check the voicemail for
3. Enter your pin number

Voicemail | Greeting

To set up your voicemail greeting, follow these steps:

1. On your desk phone, dial *15
2. Dial your pin number
3. Dial 3
4. Follow the prompts to record your voicemail greeting

Voicemail greetings can also be setup and changed in the CommPortal. See the *Voicemail | Greeting* topic in the CommPortal section.

Voicemail to Email

Voicemail messages can be sent to an email address as a .wav file. To set this up, see the *Voicemail | Message to Email* topic in the CommPortal section.

A notification of a voicemail may also be sent to your email. To set this up, see the *Voicemail | Email Notification* in the CommPortal section.

Headset Configuration

To configure a headset to a desk phone, follow these steps:

1. On your desk phone, select the home key (looks like a house)
2. Using the navigation key, select Settings
3. Select Basic
4. Select Preferences
5. Select Headset
6. Select Hookswtich Mode
7. Select Plantronics EHS
8. The phone will ask if you want to reboot, select Yes. If it doesn't ask, follow these steps to reboot:
 - a. Select the *Home* button
 - b. Using the circle Navigation key, select *Settings*
 - c. Select *Basic*
 - d. Select *Restart phone*
 - e. When asked "Are you sure?" select Yes

MaX UC Mobile App (Premium Users Only)

MaX UC is a mobile app that allows you to take the functions of your desk phone with you. To get started, follow these steps:

1. Download the MaX UC app from your device's app store. This is a free app.
2. Enter your phone number (DID number)
3. Enter your password
4. Log in

TROUBLESHOOTING

Headset Noise

If you experience extra noise or echoing on your headset, you may have interference with another headset.

To fix do the following:

- Check to be sure the bottom dial is set to 2 or 3
- Make sure the slide switch is on "A"

Restart Phone

If your phone needs to be rebooted, follow these steps:

1. Select the *Home* button
2. Using the circle Navigation key, select *Settings*
3. Select *Basic*
4. Select *Restart phone*
5. When asked "Are you sure?" select Yes

FAQs

Call Ring Back

Do calls ring back after being on hold for a time?

- A call placed on Park will not ring back.
- A call on “exclusive” hold per phone will ring back after a number of seconds.

Dialing 911

How do I dial 911 in case of emergency?

- To dial 911, simply dial 9-1-1. Dialing 9-9-1-1 will also connect you with emergency personnel.