

CommPortal Assistant is an online tool available to users subscribed to our Enhanced Feature Seat.

The following features are available as part of CommPortal Assistant.

Feature	Description
Notification icon	A system tray icon indicates when you have a new voice mail.
Incoming Call pop-up	A pop-up next to the system tray appears when you receive an incoming call.
Click-to-dial	The subscriber can enter a contact name (previously configured in CommPortal) or a number in the toolbar to initiate a call.
Outlook integration	You can use the right-click menu on the system tray icon to run synchronization on your CommPortal and Outlook Contact Lists so that changes made in one application are replicated in the other.
Instant CommPortal login	From the right-click menu on the system tray icon, you can open CommPortal at the Messages page, without having to enter a user name and password.
Change status	From the right-click menu on the toolbar, you can select Do Not Disturb or activate phone forwarding.

CommPortal Assistant is supported on the following platforms:

- Windows XP (Service Pack 2 or later)
- Windows Vista
- Windows 7
- Windows 8 (CommPortal Assistant is not supported on Win 8 RT (Windows for ARM devices) and so cannot be run on tablet devices).
- Windows 10

Outlook integration and synchronization is supported for Microsoft Outlook 2003 or later.

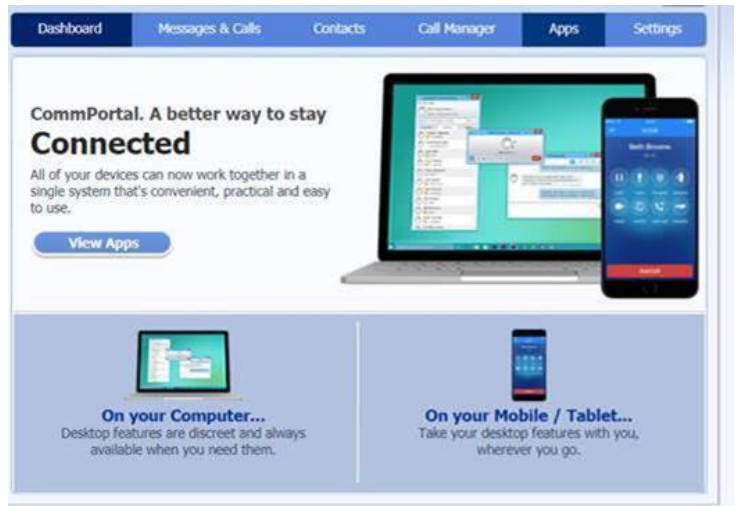
Internet Explorer must be installed on the PC, even if an alternative such as Firefox has been set up as the default browser.

- If you are deploying CommPortal Assistant with the new default CommPortal UI available from V9.3.20, the PC must be running at least IE11.

CommPortal Assistant requires approximately 8 MB of disk space for installation. CommPortal Assistant also requires .NET 3.5, a component of the Windows operating system. Most PCs already have .NET 3.5; however, if necessary, the installation process will provide the subscriber with a link to download it from Microsoft. This download is free.

Downloading CommPortal Assistant

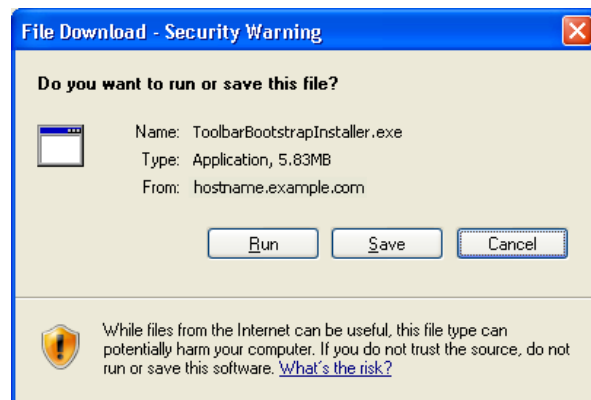
- Log into the CommPortal
- Click **Apps** on the navigation bar.
- Click **On your Computer...**



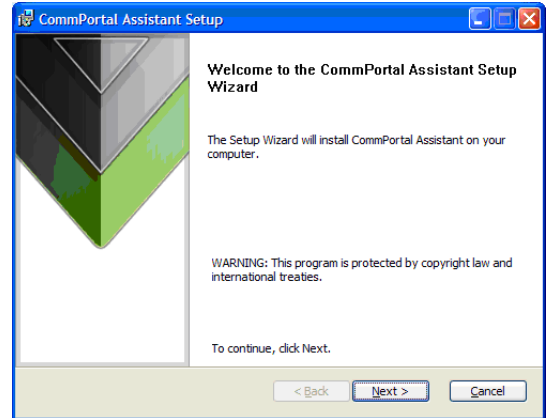
Click on the link for your PC's operating system to begin the set-up process.



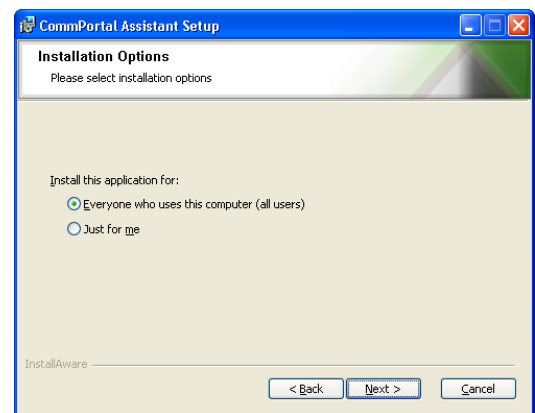
Click **Run** to install CommPortal Assistant immediately *or Save* to download it and install it at a later date.



Once you have downloaded CommPortal Assistant, you can use the CommPortal Assistant Setup Wizard to install the toolbar on your PC.



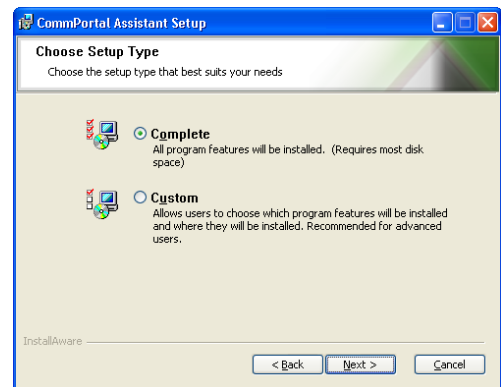
- If your computer supports multiple users, you must then select whether you want to make the tool available to all users, or only to you.
- Select desired option and click **Next**.



Even if you choose to make the tool available to all users, your CommPortal Login account remains secure. Each user must enter their own login details to access their own CommPortal Login.

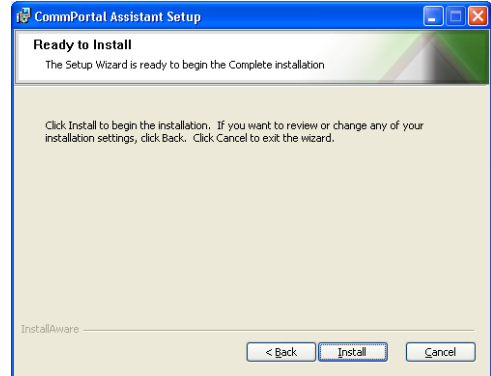
You are then asked whether you want to install the complete package or a custom package:

- If you are an experienced user, you may wish to select custom options. Otherwise, we suggest you install the complete package. Select **Complete** and then click the **Next** button.



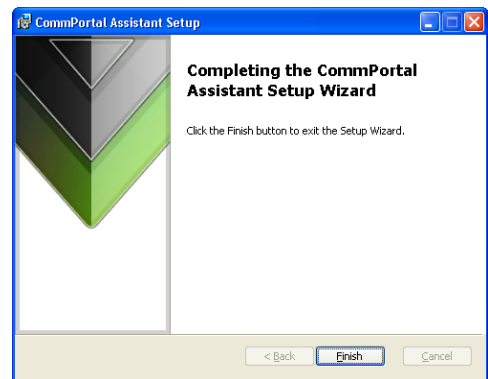
Finally, you are asked to confirm your settings, as shown.

Select **Install** to continue.



CommPortal Assistant is then installed on your PC using the settings you configured.

Once complete, click **Finish**



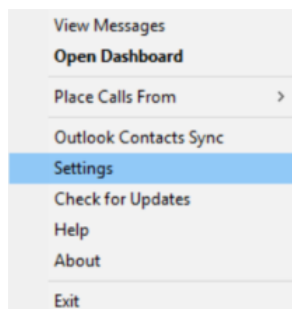
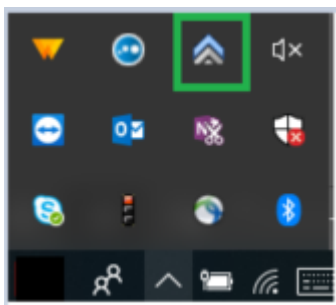
Finally, verify that CommPortal Assistant appears in your Windows Taskbar and Notification area (usually towards the bottom-right of your screen).



- If CommPortal Assistant is not visible, right-click on your Windows Taskbar, select *Toolbars*, and then click *CommPortal Assistant*.

CommPortal Assistant Desktop Settings

Right-click on the CommPortal Assistant in the system tray and select **Settings**.



CommPortal credentials section contains the following fields.

- *Number* - this is the phone number you use to access your CommPortal account.
- *Password* - this is the password used to access your CommPortal account.
- *CommPortal url* - this is part of the web address used to access your CommPortal account:
 - NY and VT Customers:
<https://commportal.sover.net>
 - NH, ME & MA Customers:
<https://myphone.bayring.com>

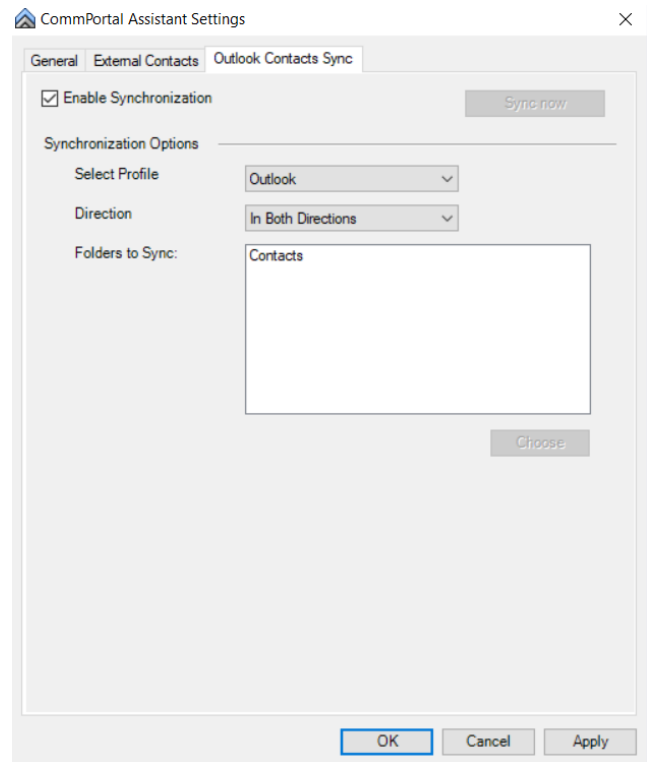
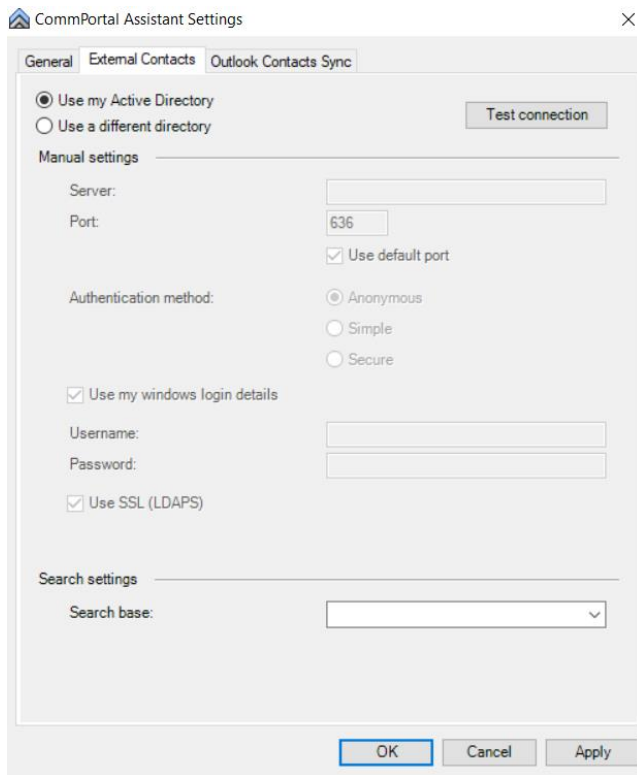
Proxy configuration section contains information used to access your account. Set to “No proxy”

General section allows you to alter the behavior of CommPortal Assistant.

- *Open automatically when Windows starts* - check this if you want the toolbar to open each time you turn on your computer.
- *Display a popup when your phone rings* – check this if you want a popup message to display when your phone rings.
- *Set up phone numbers that you can forward calls to:*
You will be able to click on from the popup window
- *Display a popup when transcription text is ready* - check this if you want an on-screen dialog box to popup each time a new voicemail transcript arrives in your account. This pop-up will display details of the message, as for voicemail messages, but will also either show the first line of the transcript or an error message explaining either that the transcription failed or that the message was too short for transcription.
- *You will only see this checkbox if you have enabled the Speech-to-Text (STT) service. If you check both this box and the one above for voicemail notifications, you will get two pop-ups each time a new message arrives: firstly, when the message itself is left and secondly when the transcript of the message is delivered.*
- *Check for updates automatically* - check this if you want CommPortal Assistant to find out and tell you if there are updates available.






The screenshot shows the 'CommPortal Assistant Settings' dialog box with the 'General' tab selected. The 'Login' section contains three input fields: 'Number' (6030000000), 'Password' (masked with asterisks), and 'CommPortal URL'. The 'Options' section has five checked checkboxes: 'Open automatically when Windows starts', 'Display a popup when your phone rings', 'Display a popup when a new voicemail arrives', 'Display a popup when a transcript is ready', and 'Check for updates automatically'. A 'Forwarding Numbers' button is next to the 'Set up phone numbers that you can forward calls to.' label. The 'Proxy' section has a 'Choose your proxy settings' label and a 'Configure' button. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

The following tabs allow you to configure contact synchronization:



The Notification Icon – From Desktop Toolbar

The notification area icon has 5 states:

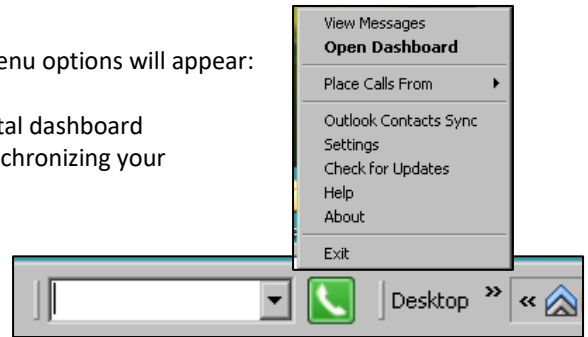
-  You have new Voicemail messages
-  Connected to the server
-  Connecting
-  Disconnected from the server
-  There is an Outlook Contacts synchronization conflict between Outlook and CommPortal

If you are disconnected and the notification icon tooltip says that login failed, bring up the **notification icon menu**, choose "Settings" and ensure your directory number and password are correct. If login still fails, your password may have been changed by an administrator – check that you can still log into CommPortal.

The Notification Icon menu




To open the notification area menu, right click on the icon. The following menu options will appear:

- View Messages: one-click access to your voicemails
- Open Dashboard: this gives you one-click access to your CommPortal dashboard
- Outlook Contacts Sync: configuration options for automatically synchronizing your local Outlook contacts and your CommPortal contacts
- Settings: configuration options for the application
- Check For Updates: allows you to manually check that you are using the latest version
- Help
- About: for licensing information and to access diagnostics if you should encounter problems
- Exit



Changing your incoming call management settings

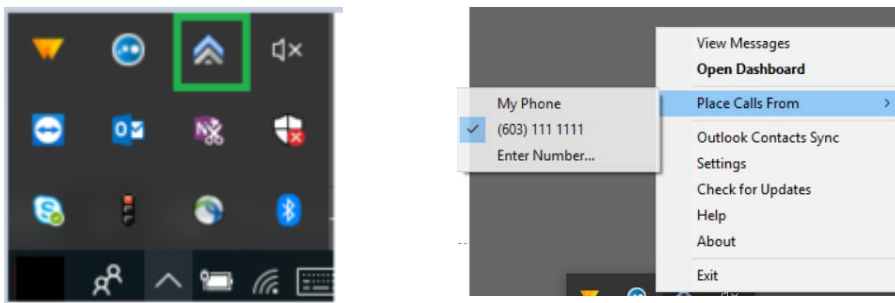
An icon on the toolbar indicates your current incoming call settings. Click the icon to change your settings. The following options are available:

-  Ring my phone
-  Do not disturb
-  Forward calls

Using CommPortal Assistant

You can set CommPortal Assistant to dial your phone or another device to initiate a phone call.

Right-click on the CommPortal Assistant in the system tray and select **Place Calls From**.



NOTE: If you dial a 9 (or other prefix) for an outside line, it must be included if you are using a number other than “My Phone”.

Placing a call

If you enter a name in your toolbar, CommPortal Assistant will look do a contact lookup from your Outlook (or other directory configured) and business group. Select the name and press enter. The device chosen in the screen shot above will start to ring and when you answer the phone the call will be placed to the contact you have selected.

NOTE: If you choose your cell phone in the “Place Calls From” setting the caller-ID will show that of your desk phone and not your cell phone.