



**END USER
PORTAL GUIDE V1.0**

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1) Introduction

a) Guide Explanation

This guide is to be used as an aid to understand the portal in order to utilize all the functionality that VoIP has to offer. This user guide is split up into different license types. Although not every feature for every license type is touched upon here, the features included in this sheet are the most popular and most difficult to configure.

b) Portal Explanation

As part of the Votacall Network, your phones are now part of the Votacall hosted solution. One advantage of this is that all changes associated to a group and each employee's phones are done over the web. Each company on the Votacall Network is setup under their own group and changes done on your current phone system can be done through Votacall's web portal.

c) Access to site

In order to access the site, you will need Internet Explorer or another Web Site Application. The address to the portal is <http://portal.Votacall.com>. You will need to obtain a username and password from your Administrator.

d) Help

Each page in the portal has a help button on the upper right part of the screen as displayed below:



Call Manager - Help - Home
Welcome Ed Lennon [Logout]

Each help button is catered to the page you're currently on. If you wish to know more information about a certain feature, click on that feature and press the help button. You will be given some information about what the feature does and all the configurable options that the feature has. Below is a screen shot of a help page:

Call Forwarding Always

You use this page to activate and edit the options for the Call Forwarding Always (CFA) service. You can turn this service on or off, or edit the options, at any time.

The Call Forwarding Always service allows you to redirect your incoming phone calls to another number, such as a mobile phone or administrative assistant. Variations of Call Forwarding exist, such as Call Forwarding No Answer and Call Forwarding Busy. Unlike those services, Call Forwarding Always redirects all of your calls, not just those received when you do not answer or are talking on your phone.

From Your CommPilot Call Manager

You can access the Call Forwarding Always page by clicking **CFA** on your CommPilot Call Manager window. 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, it is off.

From Your Voice Portal

Call Forwarding Always can also be activated or options can be changed using your voice portal. To do this, on your telephone dial *, followed by the two-digit feature access code that has been assigned for this service. You can activate this service by dialing star (*) and the assigned two-digit code, followed by the phone number to which your calls are redirected.

To view the feature access code that was assigned by your group or system administrator, click on **Feature Access Codes** on the *Utilities* menu page. The codes are to the left of Call Forwarding Always Activation and Call Forwarding Always Deactivation and are preceded by an *, which must be dialed first. Your calls remain forwarded until you dial the deactivation code.

From Your Web Portal

Call Forwarding Always can also be activated or options can be changed using your web portal.

Steps	Details
1. Turn Call Forwarding Always on or off.	Click "On" or "Off". When on, Call Forwarding Always forwards all your incoming calls to the phone number or SIP-URI address you entered in the <i>Calls Forward to</i> text box.
2. Confirm or enter the phone number or SIP-URI address.	<p>If the phone number or SIP-URI address indicated is the number to which you want all of your calls forwarded, no action is necessary. You can enter feature access codes and speed codes in addition to phone numbers and extensions. An FAC could also be used as a prefix to a speed code.</p> <p>To edit or delete a phone number or SIP-URI address, click and drag your mouse pointer over the information in the text box. The information is highlighted. Press the DELETE key on your keyboard to empty the text box of its contents, or simply begin typing, to enter new information. Type the new phone number or SIP-URI address in a valid format (no dashes, parentheses, or spaces are necessary).</p> <p>To forward to a long distance number, it must be preceded by a "+" and a country code.</p>

The Help Page is printable so that you may have a hard copy of an individual feature(s).

e) License Type Explanation

Votacall User Accounts are configured with certain user licenses determined by the client's phone administrator. The following possible licenses are available on Votacall's System:

- i) Gold License
- ii) Platinum Upgrade

- iii) Voicemail License
- iv) Advanced Feature Pack
- v) Outlook/Internet Explorer/Firefox Toolbar Integration

Each user account is given a Gold License as a base package that allows a person to make and receive calls along with other functionality. The Platinum Upgrade provides a user with additional features that expands the functionality of the Votacall Phone system. The Voicemail License provides a user with the ability to receive voicemails along with additional Voicemail options and features. The Advanced Feature Pack allows the user to take control of the more advanced features and functionality that comes with having a hosted solution. Below is a list of features that come with the Gold, Platinum and Advanced Feature packs:

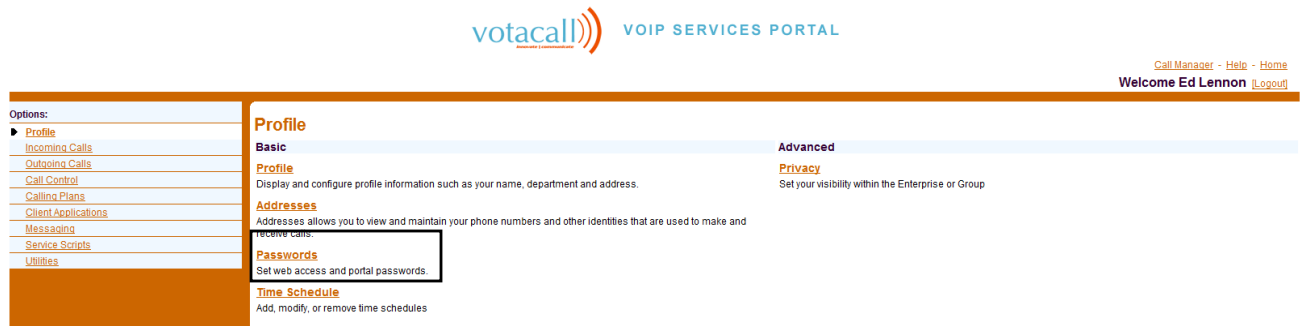
Gold User	Platinum Upgrade	Advanced Feature Pack
Anonymous Call Rejection	Automatic Hold/Retrieve	Alternate Numbers
Authentication	Votacall Anywhere	Barge-in Exempt
Automatic Callback	CommPilot Call Manager	Call Forwarding Selective
Basic Call Logs	CommPilot Express	Call Notify
Call Forwarding Always	Multiple Call Arrangement	Directed Call Pickup
Call Forwarding Busy	Outlook Integration	Directed Call Pickup with Barge-in
Call Forwarding No Answer	Remote Office	Hoteling Host
Call Forwarding Not Reachable	Sequential Ring	N-Way Call
Call Return	Shared Call Appearance	Priority Alert
Call Transfer	Shared Call Appearance 5	Privacy
Call Waiting	Simultaneous Ring Personal	Push to Talk
Calling Line ID Delivery Blocking	Two-Stage Dialing	Selective Call Acceptance
Calling Name Retrieval	In Call Service Activation	Selective Call Rejection
Client Call Control		Shared Call Appearance 10
Diversion Inhibitor		
Do Not Disturb		
External Calling Line ID Delivery		
Flash Call Hold		
Intercept User		
Internal Calling Line ID Delivery		
Last Number Redial		
Speed Dial 100		
Speed Dial 8		
Three-Way Call		

To find out more about each individual features, clicking the help button while in the feature on the portal will give a detailed description of the feature.

f) Changing Passwords

In order to change the password for your web account, you should do the following:

- i) Click on “Passwords” at the initial Welcome Screen show below:



- ii) Click on “**Set Web Access Password**”
- iii) Type in current password then the new password twice
- iv) Hit “**Apply**” or “**OK**” to save changes

g) Setting Time Schedules

Time Schedules can be created to be used for other features of your portal. You will need to create time schedules if you wish to utilize the following features: Selective Call Forwarding, Selective Call Rejection, Selective Call Acceptance and Priority Alert (optionally sequential ring). Multiple time schedules can be created in order to enhance these features. To make a time schedule you must do the following:

- i) Click on “**Profile**” on the left
- ii) Click on “**Time Schedule**”
- iii) Click on “**Add**” to create a new time schedule or click on an existing time schedule to modify a time schedule.
- iv) Enter the Name of the time schedule you wish to have under “**Time Schedule Name**”
- v) Begin entering in the time schedule information and click “**OK**” when you are complete.

2) Gold User Functions

a) Call Forwarding

There are 2 ways to accomplish this option, via phone or via web portal

i) Phone

- (1) Pick up phone and dial *72
- (2) Enter in the phone number you wish to forward the number to, followed by the # sign. If you press the # sign without entering in a number, it will forward your phone to the last number you forwarded it to.

ii) Web portal

- (1) Click on “**Profile**” on the left
- (2) Click on incoming calls on the left of the screen
- (3) Click on either of the Call Forwarding options as shown below:

Call Forwarding Always - Off

Automatically forward all your incoming calls to a different phone number.

Call Forwarding Busy - Off

Automatically forward your calls to a different phone number when your phone is busy.

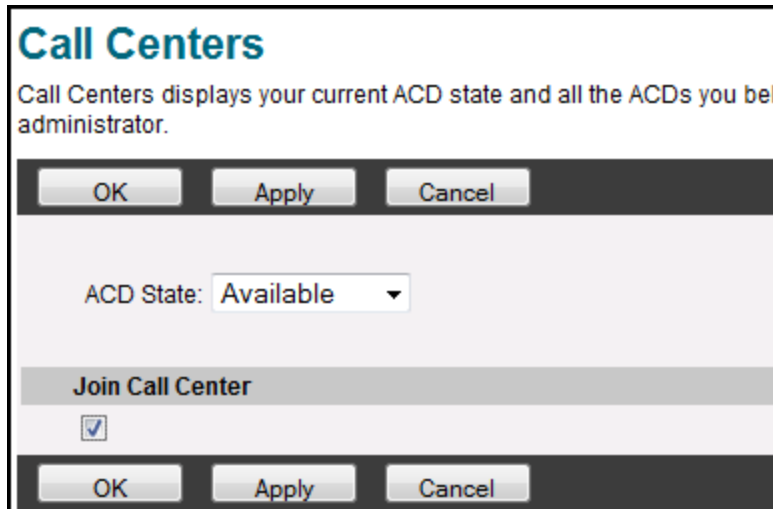
Call Forwarding No Answer - Off

Automatically forward your calls to a different phone number when you do not answer your phone after a certain number of rings.

- (4) Choose “Always” if you want all calls forwarded to the destination, “Busy” if you want all calls to forward to the destination when you’re on the phone, and “No Answer” if you want all calls to forward to the destination after a certain number of rings.
- (5) Enter in the phone number you wish to forward the calls to (without the beginning 1). Click the “on” radio button and click OK

b) Call Center: Logging In and Out

- i) Login to portal.votacall.com with your user credentials
- ii) Click on “**Incoming Calls**”
- iii) Click on “**Call Centers**”

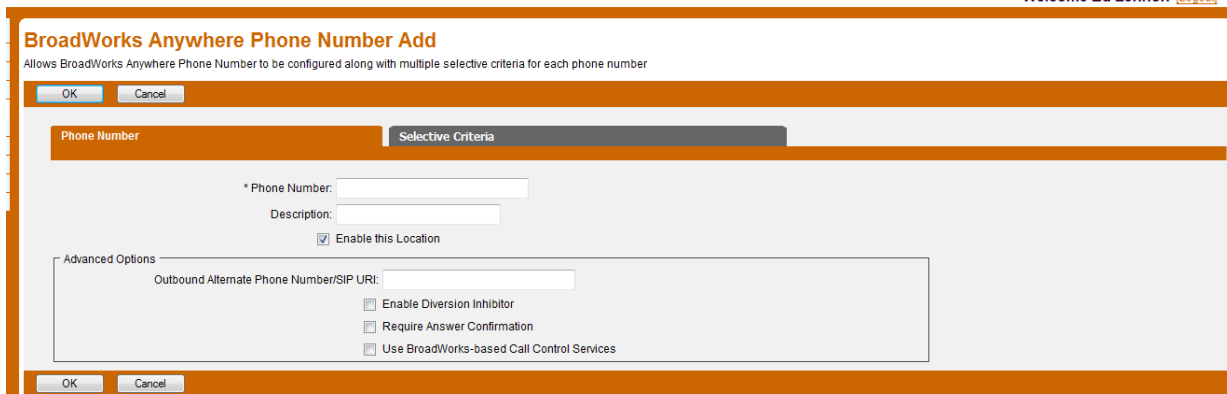


- iv) Change ACD State to “Available” and make sure Join Call Center box is checked for call center you wish to join.
- v) To logout of the call center, repeat steps **a-c** above and change ACD State to “Sign Off”

3) Platinum Upgrade User Functions

a) Votacall Anywhere

- i) Click on “**Call Control**” on the left
- ii) Click on “**Broadworks Anywhere**”
- iii) Click on “**Add**” to get a screen like below:

- (1) **Phone Number:** Enter in the number (area code and number) of the phone you wish to use as your Votacall Anywhere device

- (2) **Enable Diversion Inhibitor:** Default is checked
- (3) **Require Answer Confirmation:** If checked, will prompt the Votacall Anywhere device to confirm the call is answered when picked up. (default is checked)
- (4) **Use Broadworks-based Call Control Services:** Default is checked

Please refer to the separate Votacall Anywhere guide to learn how to utilize the Votacall Anywhere feature

b) Sequential Ring

Sequential Ring is a feature that allows a user to receive a call on multiple devices in sequential order based on optional criteria. Similar to a Find me – follow me feature, the sequential ring feature can contact up to 5 different locations all with individually configurable options

- i) Click on **“Incoming Calls”** on the left
- ii) Click on **“Sequential Ring”**

Sequential Ring

Sequential Ring allows you to sequentially ring up to 5 locations in addition to the base location for a specified number of rings. The 5 locations can be either a phone number or a SIP-URI. The feature applies to calls matching your pre-defined criteria. Use this service to ring calls from your manager, a family member, or an important customer on your cell phone, alternate business phone, or home phone. The criteria for each Sequential Ring entry can be a list of up to 12 phone numbers or digit patterns and a specified time schedule. All criteria for an entry must be satisfied for the call to enter Sequential Ring (phone number and day of week and time of day). If the criteria do not match, the call continues as if this service was not turned on.

OK Apply Add Cancel

Use Base Location first
 Number of rings for Base Location: 3
 Continue the search process if the base location is busy.
 Enable caller to skip search process. Assumes forwarding or messaging is enabled.

Location	Phone Number / SIP-URI	Number of rings	Answer confirmation required
1	<input type="text"/>	3	<input type="checkbox"/>
2	<input type="text"/>	3	<input type="checkbox"/>
3	<input type="text"/>	3	<input type="checkbox"/>
4	<input type="text"/>	3	<input type="checkbox"/>
5	<input type="text"/>	3	<input type="checkbox"/>

Active Description Time Schedule Calls from Edit
No Entries Present

OK Apply Add Cancel

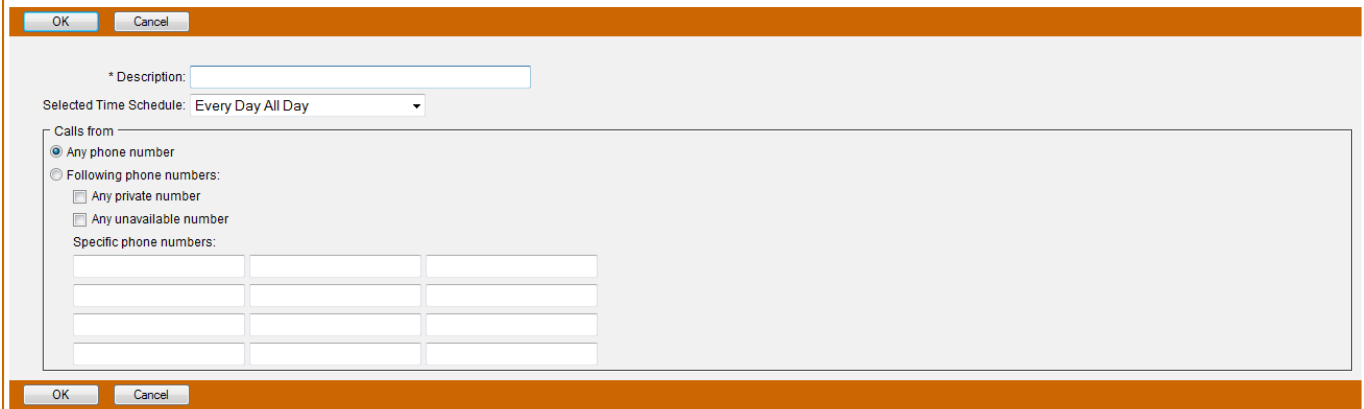
iii) The configurable options are as follows

- (1) **Use Base Location first:** all incoming calls will ring VoIP phone before it rings other locations
- (2) **Enable caller to skip search process:** Allows callers to terminate the search process and be put into voicemail or to the forwarding option.
- (3) **Phone number Entry:** Enter anywhere between 1 – 5 phone numbers or extensions for the sequential ring process. Each entry can have the number of rings set and can have answer confirmation required or not. Answer confirmation prompts the answering party to enter a confirmation digit to complete the call.

iv) Once you have filled in the correct information, click apply, then click **“Add”**

Sequential Ring Add

Allows you to add a sequential ring entry. Specify the time schedule you would like calls sequentially rung. Also, you can have the call sequentially rung when only the specified numbers call or all numbers call. If you need more than 12 numbers or more distinct time periods, you can create multiple sequential ring entries.



(1) **Selected Time Schedule:** Choose Every Day All Day if you wish to have your sequential ring setup every time a call comes in. You can also choose a time schedule that has been created in the Profile section of your portal account

(2) **Calls From:** check Any Phone number for all inbound numbers to use sequential ring. Choose Following phone numbers if you wish to specify a list of numbers.

v) Click “OK”

vi) Click “OK” or “Apply” to save the changes and enable sequential ring.

c) Simultaneous Ring

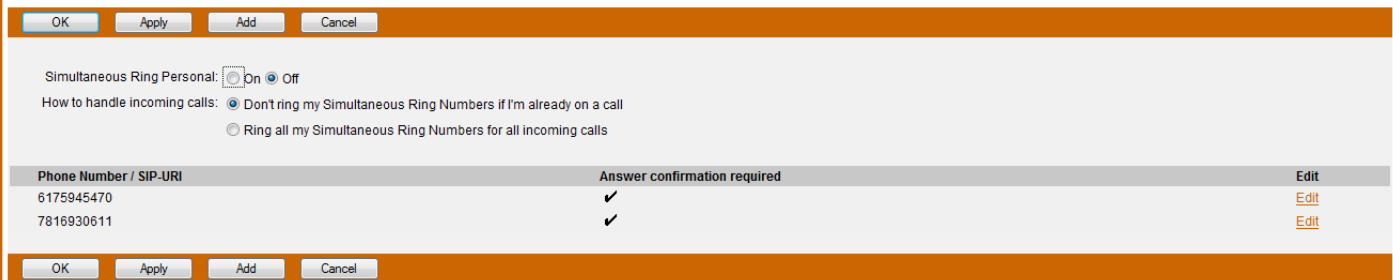
i) Click on “Incoming Calls” on the left

ii) Click on “Simultaneous Ring Personal” on the right of the screen



Simultaneous Ring Personal

Simultaneous Ring Personal allows you to list phone numbers or SIP-URI addresses you would like to ring in addition to your primary phone when you receive a call. This feature is helpful when you are not at your phone but you would like your cell phone to ring when you get a call. You can also turn off simultaneous ringing when you are at your desk on a call. Warning: if your cell phone or other phone has voice mail that picks up before your office voice messaging picks up, your voice mails could be on your cell phone messaging system!



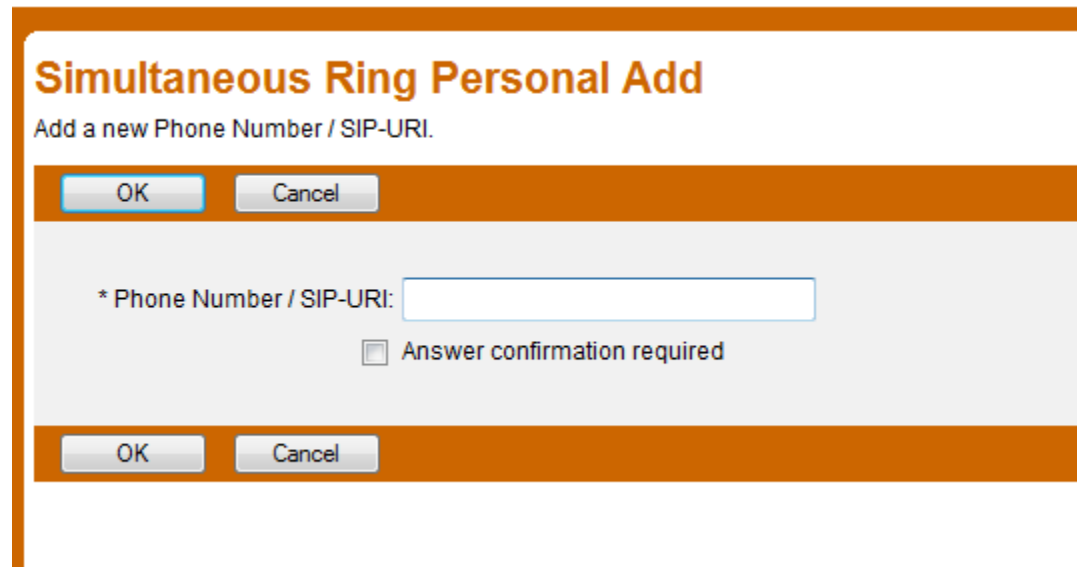
Phone Number / SIP-URI	Answer confirmation required	Edit
6175945470	✓	Edit
7816930611	✓	Edit

iii) Enter the phone number or extension (with the beginning 1) and click add.

iv) Enter more phone numbers if necessary, clicking add for each number entered.

- v) Chose appropriate option on how to handle call
- vi) Click the “on” radio button
- vii) Click **OK**

Please Note: Of all the phones that are included in the simultaneous ring personal group, the phone that picks up the call the quickest will take that call. For instance, if your phone is programmed to go to voicemail after 5 rings and one of the simultaneous ring personal phones is programmed to go to voicemail after 4 rings, the phone with 4 rings will take the call. This is important to know because calls intended for your work line might end up in other voicemails. This is evident in situations where you have a cell phone as a Simultaneous ring personal device and it's turned off or is in a location with no service. If you wish to ensure the calls get routed to the correct voicemail, make sure you check the “Answer confirmation required” check box as shown below:



Simultaneous Ring Personal Add
Add a new Phone Number / SIP-URI.

OK Cancel

* Phone Number / SIP-URI:

Answer confirmation required

OK Cancel

- viii) If the phone with phone number 6175945477 answers the call, they will be prompted to press another button to confirm call answer. This will ensure that the answering machine does not pick up the call.

d) CommPilot Call Manager

The CommPilot Call Manager is used to make and receive calls through a web interface. To get to the Call Manager, you must click on the link at the top of any page you navigate to in the web portal:

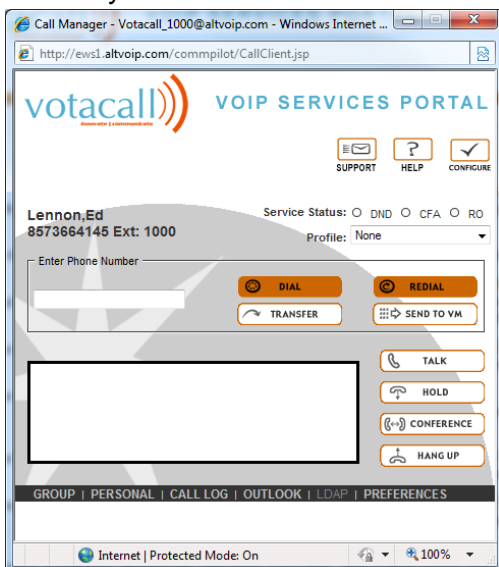
Please reference the separate CommPilot Call Manager Guide for full functionality of the CommPilot Call Manager.

e) Remote Office

Remote office allows a user to use another phone (home, cell, etc) as your business phone. By entering the phone number of the phone that you wish to use as your business phone, you can use the Commpilot call manager to place calls that will originate from your remote office phone and terminate at the destination phone with the caller ID being that of your business phone. Incoming calls will work like call forwarding always (note, you do not need to set call forwarding always – on if you are to use remote office, it will be done through remote office)

- i) Login using user credentials
- ii) Click on “**Call Control**” on the left of the screen
- iii) Click on “**Remote Office**”
- iv) Enter the number you wish to use as your remote office location and click the “on” radio button
- v) Click OK
- vi) In order to use the Remote office feature to make outbound calls, you must either have the Commpilot Call Manager open or have a license for the Toolbar. To make outbound calls using the call manager you must do the following:
 - vii) Click on the “**Call Manager**” Link on the top right of the Screen

By either choosing a contact using the links on the bottom of the page or manually entering a number, once the dial button is pressed, a call will be placed to the remote office phone. Once that phone is answered, an outbound call will be placed to the location you intended to call with the caller ID of your business line. You may either use the features on the Commpilot Call Manager to control the call or your current phone.



4) Voicemail User Functions

a) Resetting voicemail password

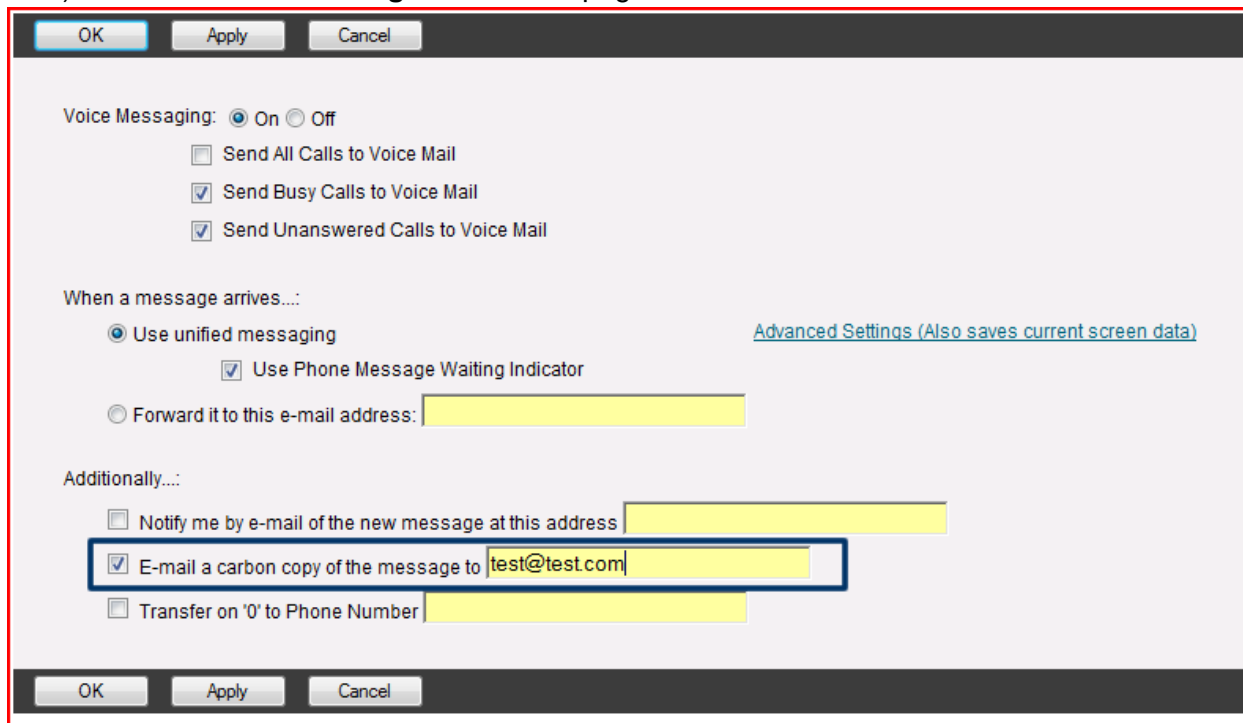
- i) Click on the “**Profile**” Link on the left
- ii) Click on “**Passwords**”
- iii) Click on the Set Voice Portal Password Radio button
- iv) Enter your new Voice password. Password must be numeric and between 4 – 8 digits.

b) Changing the number of rings before people reach voicemail

- i) Click on the “**Messaging**” link on the left
- ii) Click on “**Greetings**”
- iii) Under “Number of Rings before Greeting” Choose the number of rings from the drop down box and click OK

c) Getting voicemails emailed to me as .wav attachments

- i) Click on the “**Messaging**” link on the left
- ii) Click on “**Voice Management – on**” page



The screenshot shows a web-based settings interface for voicemail. At the top, there are three buttons: "OK", "Apply", and "Cancel". Below this, the "Voice Messaging" section has a radio button selected for "On" and "Off". Underneath, there are three checkboxes: "Send All Calls to Voice Mail" (unchecked), "Send Busy Calls to Voice Mail" (checked), and "Send Unanswered Calls to Voice Mail" (checked). The "When a message arrives..." section has a radio button selected for "Use unified messaging" and "Use Phone Message Waiting Indicator" (checked). There is a link for "Advanced Settings (Also saves current screen data)". Below that, there is a radio button for "Forward it to this e-mail address:" followed by a yellow input field. The "Additionally..." section has three checkboxes: "Notify me by e-mail of the new message at this address" (unchecked), "E-mail a carbon copy of the message to" (checked) with a blue box around the "test@test.com" input field, and "Transfer on '0' to Phone Number" (unchecked) with a yellow input field. At the bottom, there are three buttons: "OK", "Apply", and "Cancel".

- iii) Click on the 2nd check box and enter in the email Address you wish to get a copy of the call to then click ok.

d) Setting up the 0 out option on voicemails

- i) Click on the “**Messaging**” link on the left

ii) Click on “Voice Management”

OK Apply Cancel

Voice Messaging: On Off

Send All Calls to Voice Mail

Send Busy Calls to Voice Mail

Send Unanswered Calls to Voice Mail

When a message arrives...:

Use unified messaging [Advanced Settings \(Also saves current screen data\)](#)

Use Phone Message Waiting Indicator

Forward it to this e-mail address:

Additionally...:

Notify me by e-mail of the new message at this address

E-mail a carbon copy of the message to

Transfer on '0' to Phone Number

OK Apply Cancel

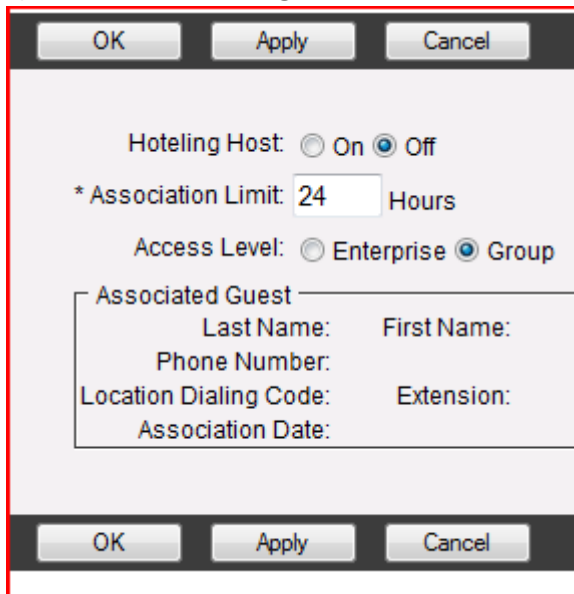
iii) Choose the last check box and enter in an extension or phone number (without the 1 in front) and click OK

5) Advanced Feature Pack Functionality

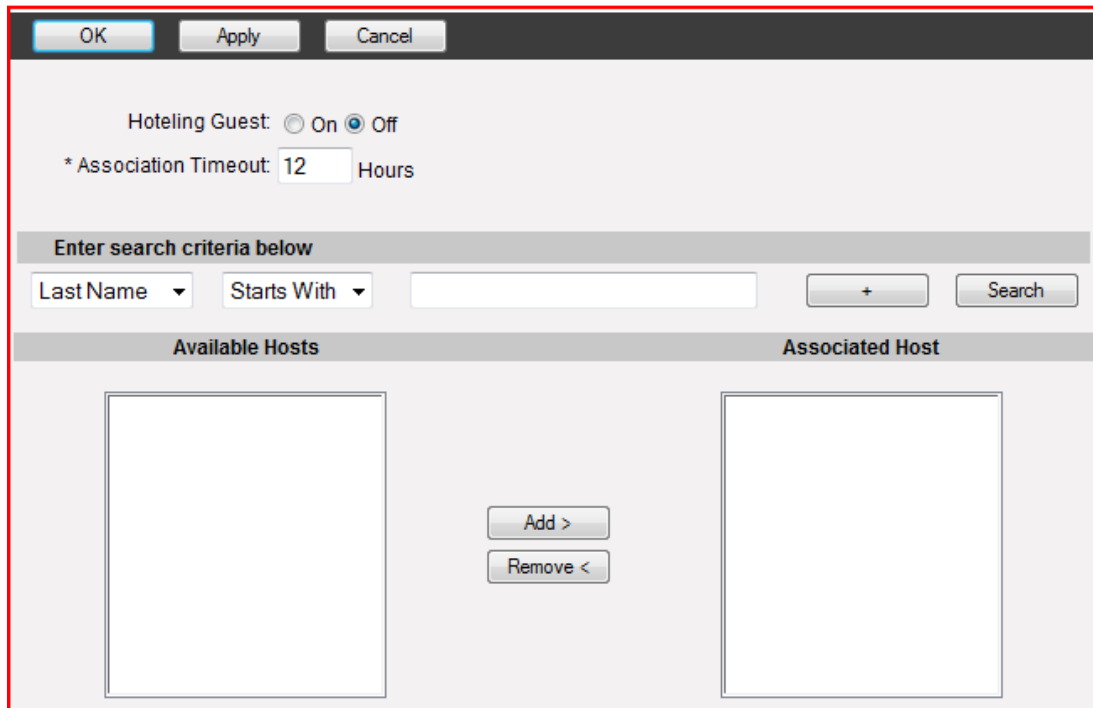
a) Hoteling

Hoteling allows you to login to a certain phone at a location other than your own and make that phone mimic your phone. The time the user can login to a phone is entered in advanced and can be manually turned on or off. Each phone that would be used to be logged into will need to have a Hoteling Host license. Any user that wishes to login to another phone will need to have a Hoteling Guest License. You cannot have a user who is a hoteling host and a guest at the same time. In order to use the hoteling license you must setup the hoteling host first:

- i) Login portal.myVotacall.com of the hoteling host user with their credentials
- ii) Choose **“Call Control”** on the left
- iii) Click on **“Hoteling Host”**



- iv) Change to “on” to enable hoteling host.
- v) In the Association Limit box, enter the # of hours the host will remain active for.
- vi) Once someone is logged into a host, their name will be in the associated guest section.
 - (1) Once the Host is setup, you will now need to setup the Hoteling guest. The guest will be associated to a host machine and will then work at that machine with the guests credentials.
- vii) Login portal.myVotacall.com of the hoteling guest user with their credentials
- viii) Navigate to **“Call Control”** on the left
- ix) Click on **“Hoteling Guest”**



- x) Click the hoteling guest radio button to “on”
- xi) Set the Association Timeout to whatever value you wish with the guest to automatically log out of the host.
- xii) In the search section, search for available hosts and add the host you wish to log into to the Associated Host column. If there are no available hosts, it means that the host has not been enabled and needs to do so.
 - (1) The guest will now be able to make and answer calls on the host phone.

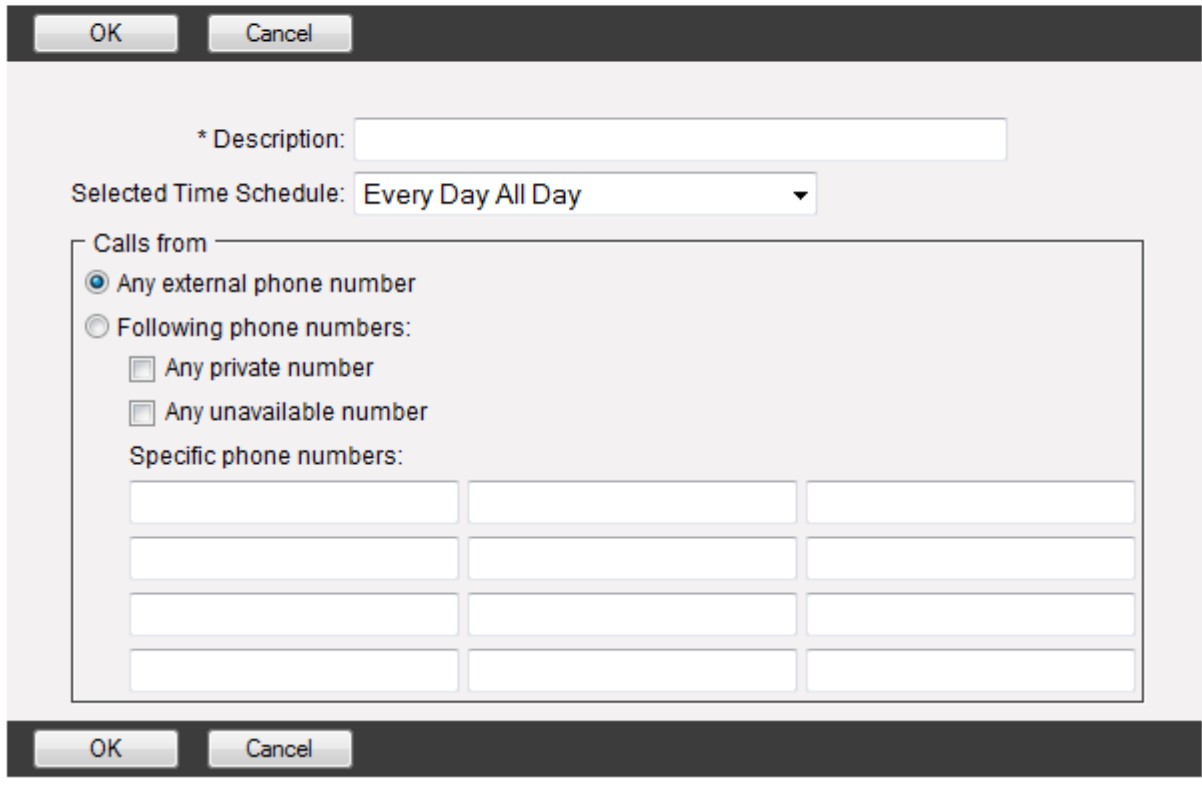
b) Priority Alert

Priority Alert allows your VoIP phone to ring with a different ring pattern for certain phone numbers specified to enable priority alert, you must do the following:

- i) Click on “**Incoming Calls**” on the left
- ii) Click on “**Priority Alert**”
- iii) Click on “**Add**”

Priority Alert Add

Allows you to add a priority alert entry. Specify the time schedule you would like a priority alert to occur. Also, you can have a priority alert occur when only specified numbers call or all external numbers call. If you need more than 12 numbers or more distinct time periods, you can create multiple priority alert entries.



- iv) Fill out the following information
 - (1) **Description:** Enter in a description for the alert
 - (2) **Selected Time Schedule:** Choose Every Day All Day if you wish to have your priority alert setup every time a call comes in. You can also choose a time schedule that has been created in the Profile section of your portal account
 - (3) **Calls From:** check Any Phone number for all inbound numbers to use sequential ring. Choose Following phone numbers if you wish to specify a list of numbers.
- v) Click “OK”
- vi) Click “OK” or “Apply” To apply the changes and enable priority alert

c) Push to Talk

Push to Talk allows a user to perform intercom calling between phones and utilize one-way or two-way calling. Once Push to Talk is setup correctly, you can dial *50 then the extension of the person who you wish to speak to. Below is how to access the Push to Talk Feature. **Please Note: In order for Push to Talk to work, both people will need the push to Talk license.**

- i) Click on “**Call Control**” on the left
- ii) Click on “**Push to Talk**”

Push to Talk

Push to Talk allows people to call each other and have the call answered automatically. You can control which users are allowed to call you in this way.

OK
Apply
Cancel

Auto-Answer: On Off

Outgoing Connection Type: One-Way Two-Way

Access List: Allow calls from only the users selected below
 Allow calls from everyone except the users selected below

Enter search criteria below

Last Name ▾
Starts With ▾

+
Search

Available Users		Selected Users
	<div style="margin-bottom: 5px;">Add ></div> <div style="margin-bottom: 5px;">Remove <</div> <div style="margin-bottom: 5px;">Add All >></div> <div>Remove All <<</div>	

OK
Apply
Cancel

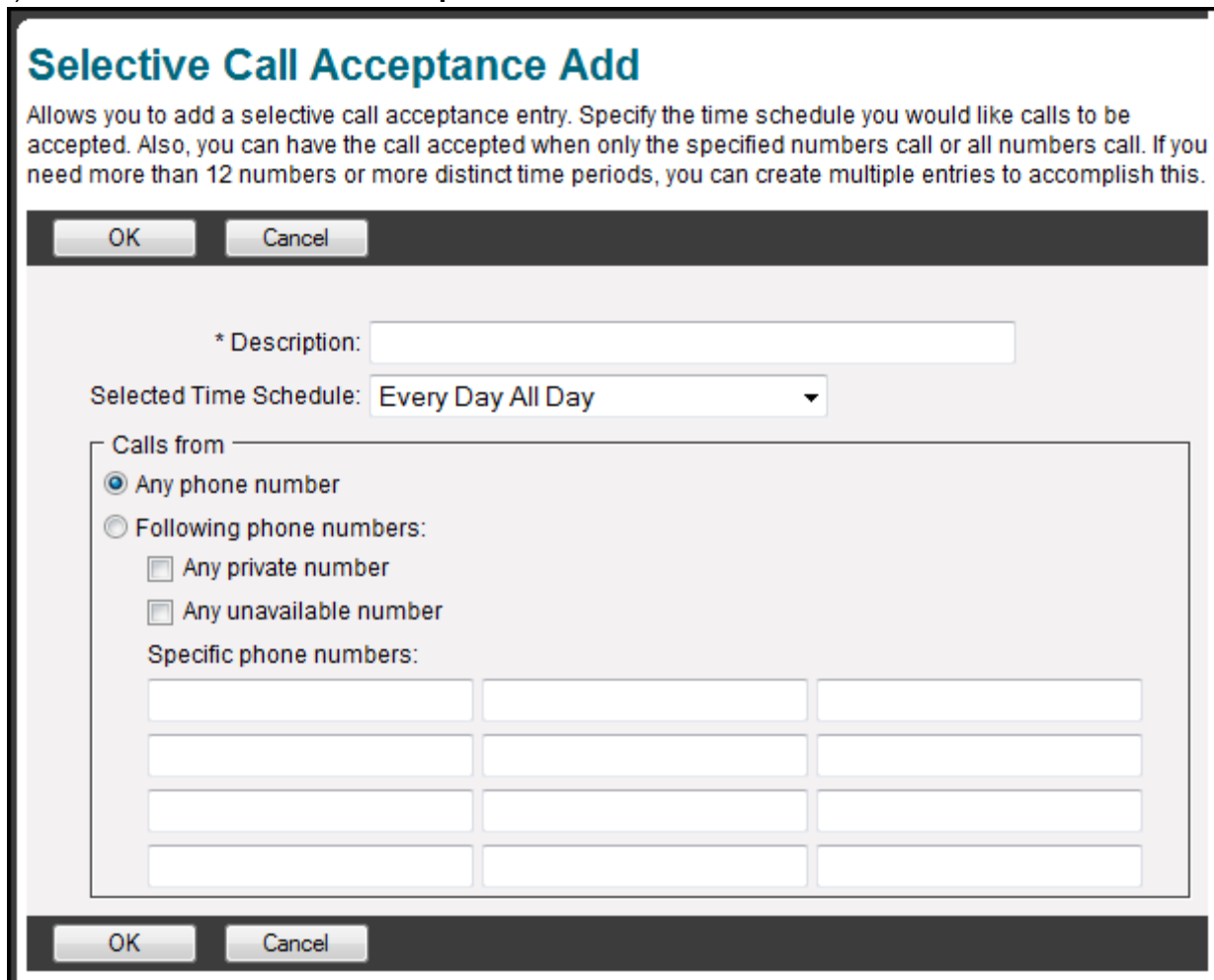
- (1) **Auto-Answer:** Enables the Push to Talk Feature
- (2) **Outgoing Connection Type:** One-Way allows the caller to talk but the callee cannot respond. Two-Way will allow both parties to talk to each other
- (3) **Access List:** In the first option, you have to specify who you can receive Push to Talk calls from. In the second option, you have to choose who you wish to receive Push to Talk calls from.

- iii) Click “**Apply**” or “**OK**” to save the changes and enable Push to Talk

d) Selective Call Acceptance

Selective call acceptance allows users to accept calls based on the time of day or the type or number of an incoming call and rejects all other calls. To enable Selective call Acceptance you must do the following:

- i) Click on **“Incoming Calls”** on the left
- ii) Click on **“Selective Call Acceptance”**



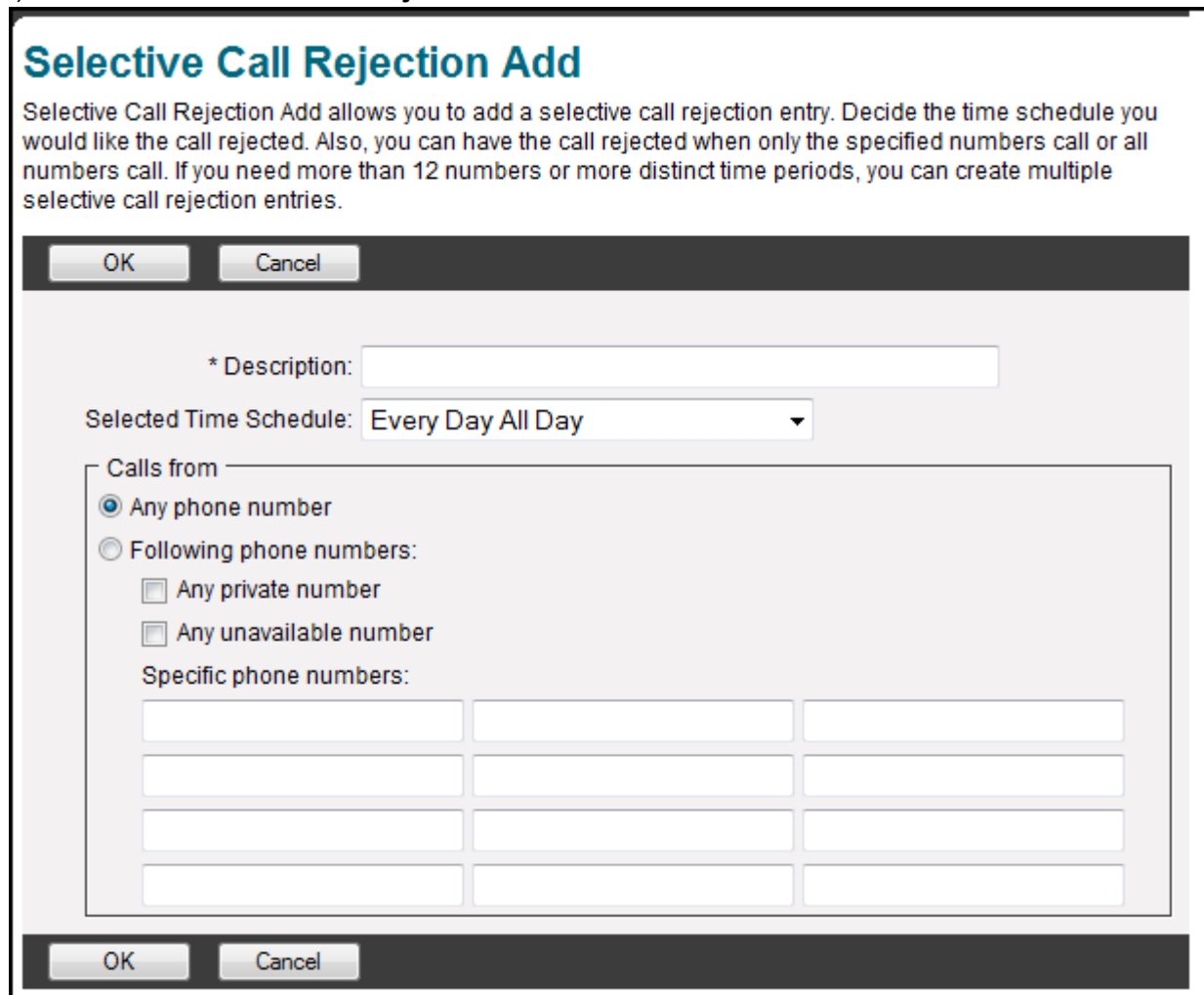
- iii) Fill out the following information
 - (1) **Description:** Enter in a description for the alert
 - (2) **Selected Time Schedule:** Choose Every Day All Day if you wish to have your priority alert setup every time a call comes in. You can also choose a time schedule that has been created in the Profile section of your portal account
 - (3) **Calls From:** check Any Phone number for all inbound numbers to use sequential ring. Choose Following phone numbers if you wish to specify a list of numbers.
- iv) Click **“OK”**

v) Click “OK” or “Apply” To apply the changes and enable priority alert

e) Selective Call Rejection

Selective call Rejection rejects calls based on the time of day or the type or number of an incoming call and accepts all other calls. To enable Selective call Rejection you must do the following:

- i) Click on “Incoming Calls” on the left
- ii) Click on “Selective Call Rejection”



iii) Fill out the following information

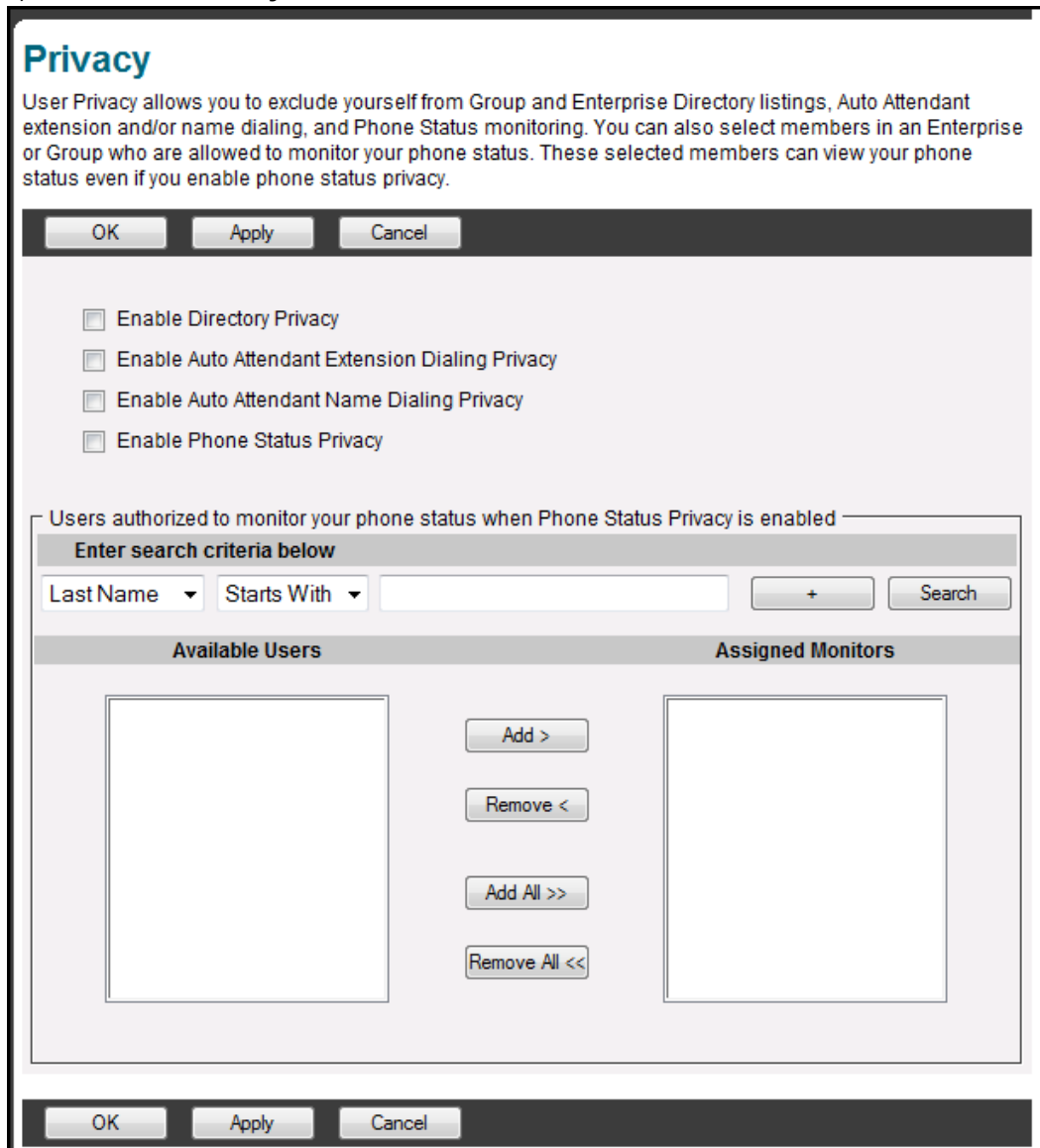
- (1) **Description:** Enter in a description for the alert
- (2) **Selected Time Schedule:** Choose Every Day All Day if you wish to have your priority alert setup every time a call comes in. You can also choose a time schedule that has been created in the Profile section of your portal account
- (3) **Calls From:** check Any Phone number for all inbound numbers to use sequential ring. Choose Following phone numbers if you wish to specify a list of numbers.

- iv) Click **“OK”**
- v) Click **“OK”** or **“Apply”** To apply the changes and enable priority alert

f) Privacy

Privacy allows you to be taken out of group directory listing, Auto Attendant Extensions or Name dialing, and phone status monitoring. To enable Privacy you must do the following:

- i) Click on **“Profile”** on the left
- ii) Click on **“Privacy”**



- iii) Privacy is configured by doing the following:

- (1) **Enable Directory Privacy:** When checked, this will remove you from directory listings within the company
 - (2) **Enable Auto Attendant Extension Dial Privacy:** When checked, excludes you from Auto Attendant Extension dialing
 - (3) **Enable Auto Attendant Name Dialing Privacy:** When checked, excludes you from Auto Attendant Name dialing
 - (4) **Enable Phone Status Privacy:** When checked, excludes yourself from phone status monitoring.
 - (5) You can search through employees and add them to the list to override phone status monitoring privacy settings.
- iv) Click **“OK”** or **“Apply”** To apply the changes and enable Privacy