

quick start

hosted phone

REvolutionizing your business



welcome to hosted phone

COMMPORTAL is the web portal used to configure the features on your new REV Business phone system. With CommPortal, you can:

- View missed & dialed calls
- Listen to voicemail messages
- Manage your contacts
- Set-up rules to route your calls

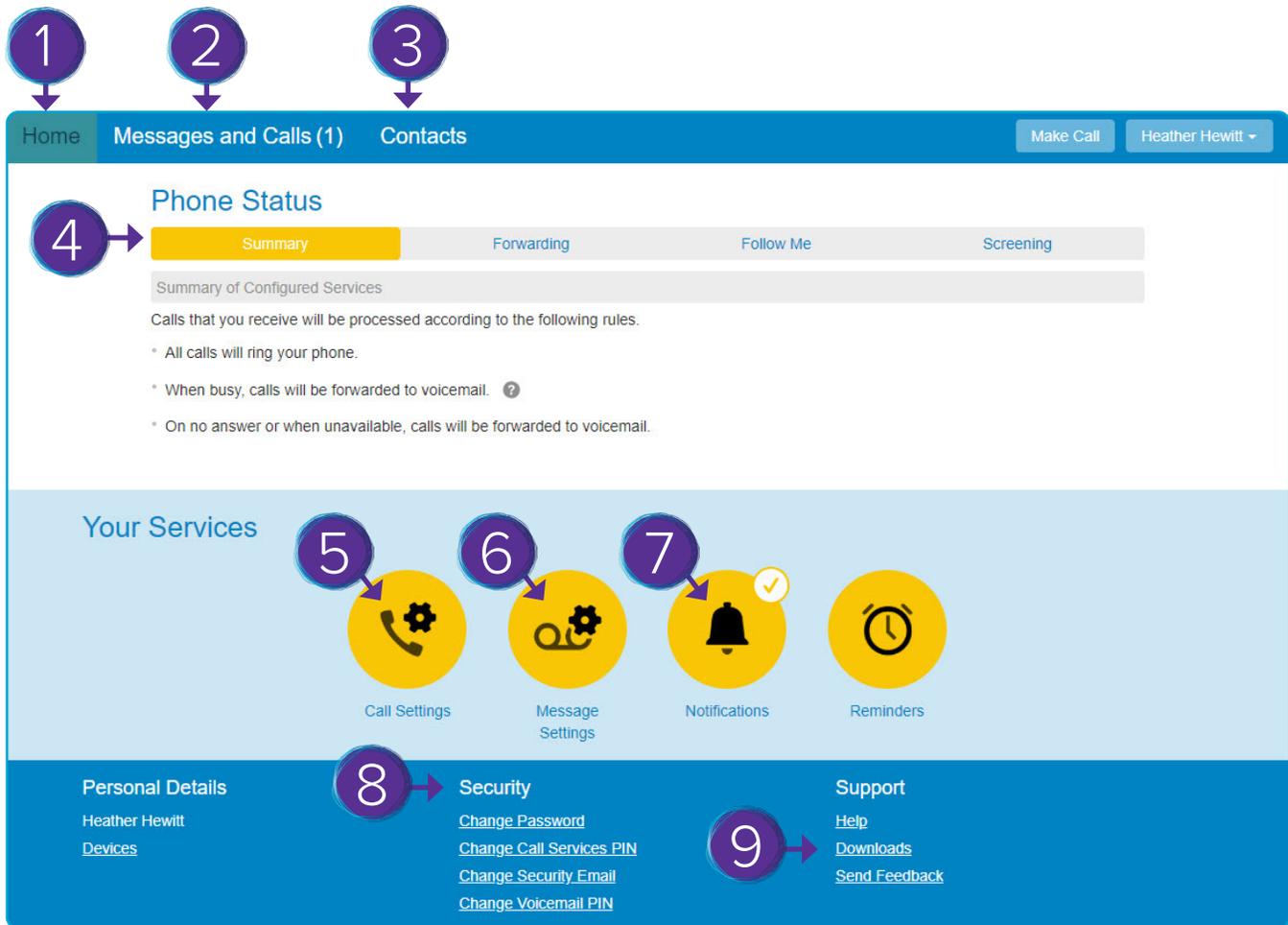
Where MaX UC Desktop is referenced in this document, please note:
**MAX UC DESKTOP IS NOT INTENDED FOR USE IN MAKING 911 CALLS.
YOU SHOULD USE ANOTHER SERVICE TO MAKE ANY CALLS FOR EMERGENCY
911 SERVICES.**

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Getting oriented

Once you are logged in, you will be on the CommPortal HOME screen:



1. HOME

Quick view of most common functions

2. MESSAGES & CALLS

Access call history & voicemail

3. CONTACTS

Store and retrieve contact information

4. PHONE STATUS

Manage how your incoming calls are managed

5. CALL SETTINGS

Make changes to caller ID, call forwarding and call blocking

6. MESSAGE SETTINGS

Manage your voicemail settings & greetings

7. NOTIFICATIONS

Customize your preferences on how & when you are notified of messages

8. SECURITY

Allows you to change your password and PINs.

9. DOWNLOADS

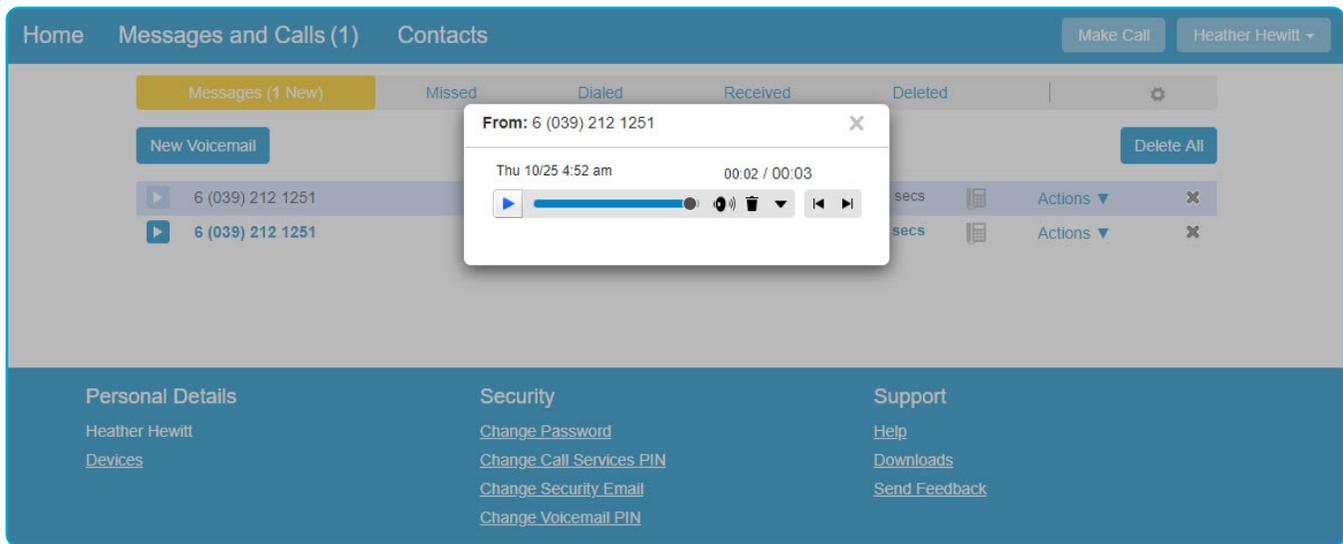
Access to various apps that compliment your Hosted Phone and CommPortal services

[This Guide may vary from your individual CommPortal screen based on the settings chosen by your administrator.]

messages & calls

The **MESSAGES & CALLS** tab displays all the recent call activity you have had.

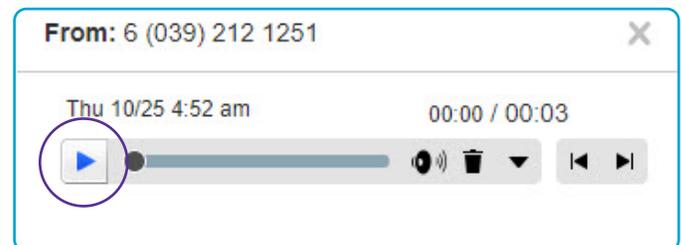
Here you can retrieve voicemails and view calls based on whether they were missed, answered, dialed or deleted. Click on one of the sub-tabs to get more detail.



PLAY MESSAGE

Click the Play Arrow button to listen to a voicemail and the message player will open.

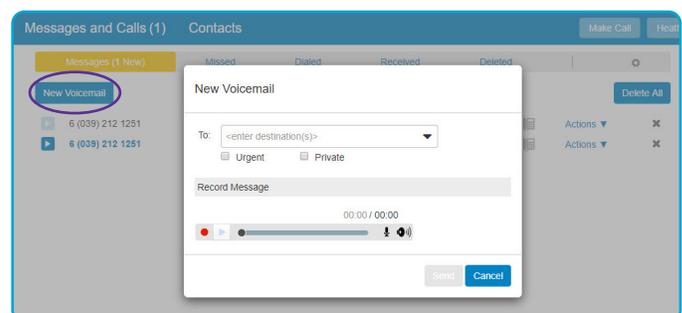
Voicemails can be listened in any order and you have the option to save or delete either on the player screen or main screen.



LEAVE SOMEONE A VOICEMAIL

This feature enables you to leave voicemails for other users of this voicemail system by recording and sending a message through this website rather than phoning them. You can also record a single message in this way to be left for multiple users rather than phoning them each individually.

Click the **NEW VOICEMAIL** button to record and leave a voicemail as a memo. Your computer requires a microphone for this feature.

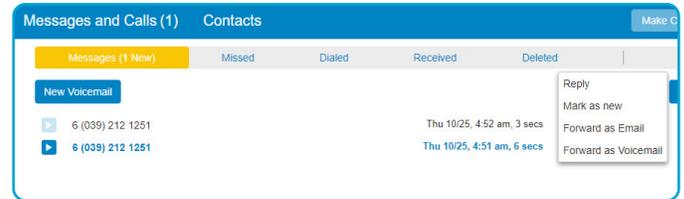


messages & calls

REPLY TO OR FORWARD A VOICEMAIL

Click the ▼ **BUTTON** at the end of the line to:

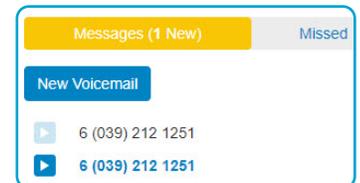
- Mark as Heard/New
- Forward as Email
- Forward as Voicemail - as long as they are not marked private
- Save File - only available in message player
- Reply - only available in message player



MISSED MESSAGE ICON

If the missed call resulted in a voicemail, one of the following icons will be displayed:

-  You have an unheard message as a result of this call.
-  You have already heard the message resulting from this call.
-  A message was left, but it is no longer in your inbox.



MAILBOX QUOTA

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

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

In addition to voicemail content you may be told that you also have "other" content.

- If you have accessed your mailbox using a remote email client (such as Microsoft Outlook) over IMAP and accidentally moved, for example, emails into your mailbox, such content will take up space in your mailbox. However you will be unable to access it through this website - you will need to use your remote email client again to remove it.
- You may need to permanently delete some of the deleted messages in the "Deleted" tab in order to reduce the size of your mailbox.

EXPORT CALLS

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

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

The **CONTACTS TAB** enables you to manage all of your contact information.

Within it, you can create new contacts using recent call information like a missed, dialed or received call, create groups of contacts or import/export your contacts.

EXPORT CONTACTS

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

Note that the exported data does not include any information about what contact groups the contacts may belong to. The fastest way to add your contacts is to import them from your email program. If you use Microsoft Outlook, here's how:

EXPORTING OUTLOOK CONTACTS

1. From the Outlook File tab, select **IMPORT** and **EXPORT** or **OPTIONS** then **ADVANCED** if that's not available - a new window should appear
2. Click **EXPORT** - a new window should appear
3. From the list, select **EXPORT TO A FILE** & click **NEXT**
4. From the drop down list, select **COMMA SEPARATED VALUES** (Windows) & click **NEXT**
5. From the folder tree, select **CONTACTS** & click **NEXT**
6. Save exported file as **OUTLOOK CONTACTS** & click **BROWSE** to select a location to save the exported out contact file.
7. Click **NEXT** & then **FINISH**

IMPORT CONTACTS

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

If there is a match, but the two versions do not contain any conflicting information then the import operation will simply add any additional details from the imported version of the contact to the existing version.

COMMPORTAL CONTACT IMPORTING

Once the file has exported completely, go to the CommPortal Contacts tab

1. Click the **IMPORT** button
2. Click the **BROWSE** button to find the Outlook Contacts file
3. Select the file & click **IMPORT**

NATIVE FORMAT

In native format, each exported contact list entry also includes a unique numerical identifier. If a CSV file containing such identifiers is subsequently re-imported, then contacts in the CSV file are considered to match entries in the contact list if their numerical identifiers match; matching is done on the basis of this identifier in preference to using the contact name. This is valuable if, for example, you wish to export your contacts to a spreadsheet, make a set of changes and then re-import them - even if you change a contact's name, it will still be correctly correlated with the existing contact list entry.

EXTENSIONS

Allow you to quickly dial other numbers in the Business Group.

SHORT CODES

Short codes allow you to quickly dial common numbers.

The short code screen shows you the list of short codes you have already defined.

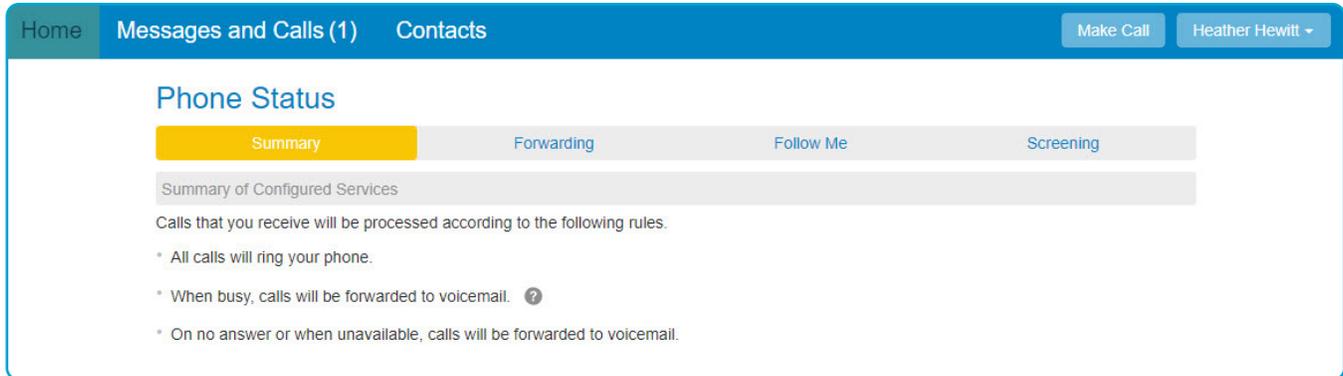
SPEED DIAL

Makes dialing faster by allowing you to assign a one or two digit code to speed dial to different telephone numbers.

The speed dial shows you the list of speed dials you have already defined and provides you with a form for configuring more.

phone status

The **PHONE STATUS** section allows you to view and configure settings for all of your incoming calls.



SUMMARY

Provides a description of how calls you receive will be handled, taking into account the settings for all of your incoming call services and any interactions between them.

This description enables you to confirm that services you have configured will have the desired effect on your calls. If the description does not match the behavior you would expect, then it is possible that services you have configured are interacting or overriding one another. If a service is interacting with another service, or being overridden, then a  icon will appear on the configuration page for that service. Click this icon for further information.

FORWARDING

Enables you to route calls to a second number. ex. like a home or mobile number.

To set up, choose how you'd like no answer or busy calls to be handled. If you do not set anything up, calls will be sent to voicemail.

- **IMMEDIATE**
Calls are forwarded as soon as you receive them.
- **BUSY**
Calls are forwarded whenever your line is busy. If you have multiple (twinned) devices, then this service only applies if all of your devices are busy (or reject the call).
- **NO ANSWER**
Calls are forwarded if you do not answer your phone within a certain time.
- **UNAVAILABLE**
Calls are forwarded if your phone is unavailable. e.g. it is unplugged or loses power
- **SELECTIVE**
Calls from selected callers are forwarded as soon as you receive them.

FORWARDING DESTINATIONS

The forwarding tab also provides access to your Forwarding Destinations. These are numbers that you regularly forward calls to and that you preconfigure for ease of use.

phone status

FOLLOW ME

When enabled, this service redirects calls that you receive to one or more alternate destinations. You may configure multiple destinations to ring in turn, simultaneously, or a combination of the two.

To configure this service, you must define a number of rules. Each rule defines a destination you want to ring when you receive a call, and how long you wish that destination to ring for. Each rule is assigned to a numbered step. As soon as you receive a call, all destinations referred to by rules in step 1 begin to ring simultaneously. As soon as the last of these destinations has completed ringing, all destinations referred to by rules in step 2 begin to ring simultaneously and so on. This continues until the call is answered or all configured destinations have been rung. You can have up to a maximum of 6 steps, and multiple rules may be assigned to each step.

NOTE Your own number will only ring if you configure a rule with your phone number as the destination.

The screenshot shows the 'Phone Status' interface with the 'Follow Me' tab selected. It includes a 'Follow Me' section with 'Add Rule' and 'Clear List' buttons, and a 'Welcome to Follow Me' section with instructions to click 'Add Rule'.

PERMIT FORWARDING

This defines whether or not the destination configured by this rule is allowed to forward the call.
e.g. to voicemail or to another telephone number

If any of the destinations you configure to ring forward the call to voicemail then this will count as the call being answered, and no further destinations will be tried. This can be avoided by setting this value to No for all destinations other than the last one you wish to ring.

SCREENING

Enables you to block certain numbers.

You should always use the full number including the area code. It is not possible to add callers with other number types. e.g. international callers

The screenshot shows the 'Phone Status' interface with the 'Screening' tab selected. It includes a 'Call To Accept' section with an 'Edit List' button, and an 'Options' section with a radio button for 'Ring my phone once when a call is rejected?' set to 'No'.

The following screening options may be available:

- **SELECTIVE ACCEPTANCE**
Allows you to only accept calls if they are from selected callers.
- **SELECTIVE REJECTION**
Allows you to enter a list of numbers that will be blocked.
- **ANONYMOUS REJECTION**
Blocks all anonymous calls, for instance, many telemarketers will call anonymously.
- **PRIORITY CALL**
Makes calls ring distinctively if they are from selected callers.

call & message settings

GENERAL CALL SETTINGS

• CALL TRANSFER NUMBER

When a caller is put through to your Voicemail, they are given the option of being transferred to the number set by your business group administrator and specified here.

• WITHHOLD CALLER ID WHEN MAKING CALLS

Your caller ID is normally presented when you make a call - select the checkbox to withhold your caller ID when you make a call.

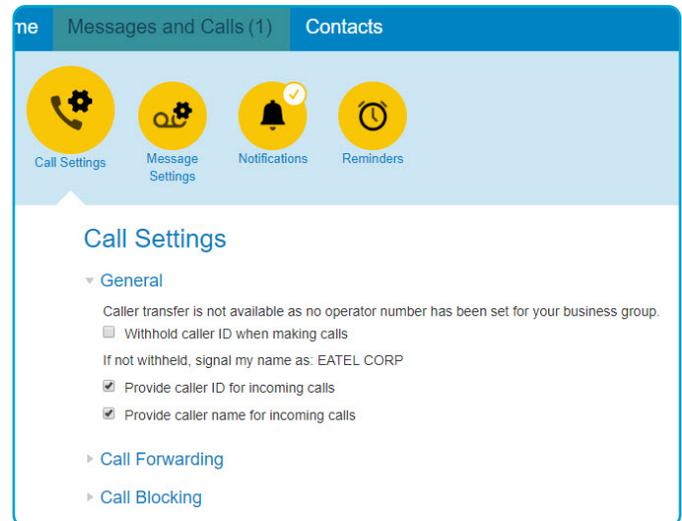
You can also set your name to be included with the caller ID when it is presented. You can override the default caller ID presentation setting on a per call basis by dialing the appropriate access code.

• PROVIDE CALLER ID FOR INCOMING CALLS

Controls whether information about callers is delivered to your phone.

• PROVIDE CALLER NAME FOR INCOMING CALLS

Controls whether caller names are delivered to your phone when they are available.



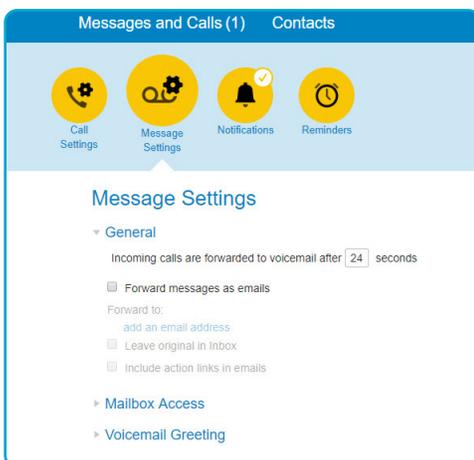
CALL FORWARDING

These options apply when configuring Call Forwarding via your telephone rather than via this web page.

CALL BLOCKING

If you cannot unselect a call type, this means that your service provider has blocked this type of call.

You can use the [MESSAGE SETTINGS](#) page to change various settings for the Voicemail service such as forwarding messages and adjusting your greeting.



FORWARDING CALLS TO VOICEMAIL

This allows you to set the time in seconds that your phone rings before the call is sent to voicemail. The acceptable range is from zero to 60 seconds.

FORWARDING CALLS TO EMAIL

You can select to forward all your received messages via email.

- When you enable this forwarding, you have the choice of leaving the messages in your CommPortal inbox, so you can still access them here, or of deleting them. Check the box if you want to leave the original message in your inbox.
- You can also choose to include action links in the forwarded message. These links allow you to perform actions { e.g. deleting the message } on the copy of the message stored in your messaging service.

message settings

MAILBOX ACCESS

These settings allow you to customize your experience when accessing your mailbox via the telephone.

- **SKIP PIN**

If Skip PIN is enabled, then when accessing your mailbox from your own telephone you are not required to enter your PIN. This saves you time, but reduces security as anybody with access to your telephone can then access your mailbox.

- **FAST LOGIN**

Generally when you dial into your mailbox you are asked to enter both your phone number and PIN.

However, if Fast Login is enabled, then when accessing your mailbox from your own telephone, your phone number is recognized automatically, and you only need to enter your PIN.

- **AUTO-PLAY VOICEMAIL/FAX**

If Auto-play is enabled, then when you log into your mailbox, instead of hearing the main menu your messages will start playing immediately.

- **VOICEMAIL PLAYBACK**

When your messages are played to you, you can choose whether you wish to hear the message details (who the message is from and when it was left), the message itself, or both.

Message Settings

▸ General

▾ Mailbox Access

Skip PIN

Fast Login

Auto-play voicemail

Voicemail playback

VOICEMAIL GREETING

The Voicemail Greeting panel allows you to configure which greeting will be played to callers who reach your voicemail. You can choose to either use a standard system greeting, record or upload and use a personal message of your choice.

For your default greeting, you should select a greeting from the list of available greetings in the dropdown box. The list of greetings includes the following standard system greetings.

- **SYSTEM**

This plays the normal system greeting, with no identifying information.

- **SYSTEM WITH NUMBER**

This plays the normal system greeting, including your phone number.

- **SYSTEM WITH NAME**

This plays the normal system greeting but includes your recorded name.

Message Settings

▸ General

▸ Mailbox Access

▾ Voicemail Greeting

Use the greeting:

▾ more options

Use a different greeting when I'm in a call. [record](#)

Use different greeting outside business hours. [record](#)

Use different greeting within my business group. [record](#)

You can also choose to use a greeting where you can record or upload a personal message. Greetings that already have a recording will be marked with a * beside the name in the list.

notifications

The **NOTIFICATIONS TAB** allows you to configure the different kinds of notifications that you can use with your messaging service.

MESSAGE WAITING INDICATOR

For handsets that support message waiting indicators, you can configure the voicemail system to notify your phone whenever you receive a new message.

Depending on your phone the notification will either flash a light on your handset, display a notification icon on the screen and/or signal a message with a sound or vibration.

The screenshot shows the 'Notifications' section with a 'Clear List' and 'New Entry' button. Under 'Message Waiting Indicator', there is a checked checkbox for 'Send phone notification of incoming messages to the following phone numbers'. Below this is a table with three columns: 'Phone Number', 'Urgent Voicemail', and 'All Voicemail'. The first row contains the phone number '(225) 621 4113', an unchecked checkbox for 'Urgent Voicemail', and a checked checkbox for 'All Voicemail'.

OUTDIAL INDICATOR

This feature enables you to configure the voicemail system to call you whenever you receive a new message.

You can choose which types of messages you would like to be notified about and/or signal a message with a sound or vibration.

The 'Outdial' configuration form includes a checked checkbox for 'Send outdial notification of incoming messages, according to the schedule:'. Below this is a text input field for 'Specify the phone number to send outdial notifications to:'. Under 'Choose the incoming messages that should be notified to the specified phone number:', there are two unchecked checkboxes: 'Urgent Voicemail' and 'All Voicemail'. The 'Set a retry limit and delay between retry attempts until the message is marked as read:' section contains two input fields: '3' for 'Number of outdial retry attempts' and '15' for 'Delay between retries (minutes)'. At the bottom, there are two radio buttons: 'Stop retries when you answer the call' (selected) and 'Stop retries only when you access your voicemail'.

OVERRIDE NOTIFICATION

This feature enables you to configure the voicemail system to notify you differently for a period of time.

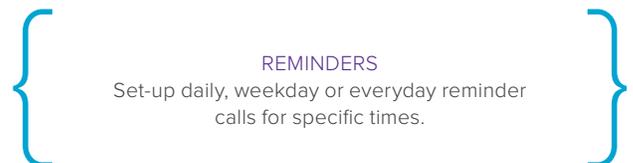
For example, while you are on vacation, you might only want to be notified of urgent messages and you might want to be notified in a different way from normal.

The 'Override' configuration form includes a checked checkbox for 'Override your outdial and pager notifications, sending them according to the schedule:'. Below this is a dropdown menu for 'While the override profile is active, notify me by:' set to 'Outdial'. The 'Expiry date:' section has three input fields: '04', '10', and '2019', followed by a calendar icon. Under 'Specify the phone number to send outdial notifications to:', there is a text input field. Under 'Choose the incoming messages that should be notified to the specified phone number:', there are two unchecked checkboxes: 'Urgent Voicemail' and 'All Voicemail'. The 'Set a retry limit and delay between retry attempts until the message is marked as read:' section contains two input fields: '3' for 'Number of outdial retry attempts' and '15' for 'Delay between retries (minutes)'. At the bottom, there are two radio buttons: 'Stop retries when you answer the call' (selected) and 'Stop retries only when you access your voicemail'.

NOTIFICATION SCHEDULE

If you configure an outdial or override notification, you can also configure a Notification Schedule. The Notification Schedule allows you to restrict notifications so that they are only generated at particular times of day, and on particular days of the week.

For example, you might not want to be called and informed of a new message that you have received in the middle of the night.

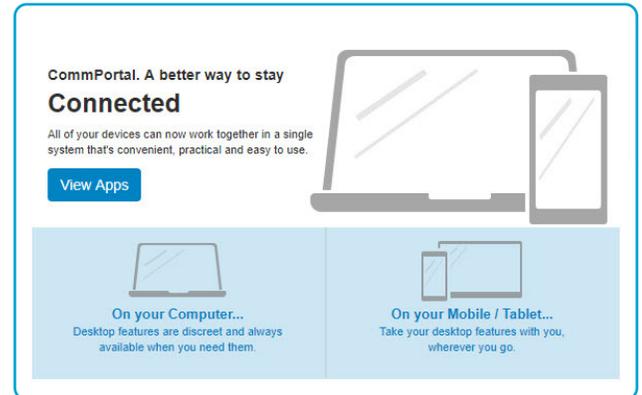


apps & click to dial

APPS allows you to manage various features of your phone service.

MAX UC DESKTOP

- Allows you to make and receive audio/video calls with your CommPortal account
- Sync your contacts with MaX UC Desktop to see their presence and make chatting or calling them easy, straight from the app
- Changing your Phone Status is now to do from the main window
- Your new voicemails are displayed clearly in the voicemail notification, from here you can manage your messages with the ease of visual voicemail
- NOTE: MAX UC DESKTOP IS NOT INTENDED FOR USE IN MAKING 911 CALLS. YOU SHOULD USE ANOTHER SERVICE TO MAKE ANY CALLS FOR EMERGENCY 911 SERVICES.



MAX UC MOBILE

- Make and receive calls with your CommPortal number

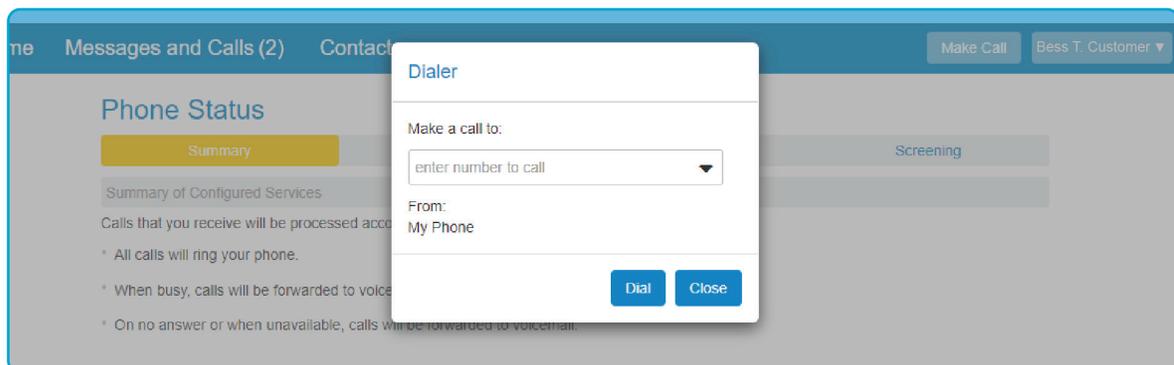
{ Both apps are available by selecting [DOWNLOADS](#) at the bottom right of the CommPortal home page. }

click to dial

From the [MAKE CALL](#) button, you can trigger calls from any phone by using Click-to-Dial.

First calls the phone you have access to and once you pickup, connects you with the person you're trying to contact.

A Click-to-Dial call will display your usual caller ID to the other party but can originate from any phone. This can be useful if you are away from your usual phone but need to make a call.



hosted phone feature guide

PLACE OR ANSWER A CALL

1. Pick-up the receiver, press the **SPEAKER BUTTON** to use the speakerphone.
2. Press the **HEADSET BUTTON** to use a headset.

You may have to dial a number to reach an outside line before placing your call.

ADJUST THE VOLUME AND MUTE

ADJUST THE CALL VOLUME

1. Lift the handset or press the **SPEAKER BUTTON**.
2. Press **+** or **-** on the **VOLUME BUTTON** to increase or decrease the volume.

ADJUST THE RINGER VOLUME

Press **+** or **-** on the **VOLUME BUTTON** when the handset is on the phone & the **SPEAKER BUTTON** is off.

USING MUTE

1. Press the **MUTE BUTTON** on the phone. It will glow red to indicate mute is on.
2. Press the **UNMUTE BUTTON** again to unmute.

USE THE SPEAKER PHONE

Press the Speaker button. The handset can be either on or off the hook.

VOICEMAIL

SETUP AND ACCESS YOUR MAILBOX

1. Press the envelope button on your phone
2. Enter the default PIN: 147258 and press #

FOLLOW THE TUTORIAL GUIDE TO

- Set your confidential PIN
- Record your personal greeting
- Record your name

LISTEN TO MESSAGES

1. Press the **MESSAGES BUTTON** on your phone to access your voicemail.
2. Press **1** to get your messages.
3. Then press **1** to listen to your voicemails.
4. Once you have played a message:
 - Press **1** to **REPEAT** the message
 - Press **2** to **SAVE** the message as new
 - Press **3** to **DELETE** the message
 - Press **4** to **REPLY** to the message
 - Press **5** to **SEND A COPY** of the message
 - Press **#** to **LEAVE** the message as saved

You can also manage your voicemail using the CommPortal web interface. Refer to the Messages & Calls section on page 4 of this guide.

hosted phone feature guide

FORWARD MESSAGES

1. Press the **MESSAGES BUTTON** on your phone to access your voicemail.
2. Press **1** to get your messages.
3. Then press **1** to for voicemails.
4. Once you have listened to the message, press **5**.
5. Enter the telephone number of the person (**AREA CODE + PHONE NUMBER**) you wish to receive the message followed by **#**.
 - Press ***** to cancel and start again
 - To add additional recipients, enter the number & then press **#**.
6. Press **#** to move to the next step.
7. Record an introduction:
 - Speak after the tone, then press **#**.
 - To skip recording an introduction, press **1**.
8. Press **#** to send the message immediately.

USE A HEADSET

ATTACH THE HEADSET

1. Turn the phone body over to expose the ports on the back of the unit.
2. Insert the long end of the phone cord into the head set port on the phone body that is marked with a phone symbol.
3. Route the phone cord through the cable slot. Optional
4. Insert the other end of the phone cord into the port at the bottom of the head set.

USE THE HEADSET

1. Press the **HEADSET BUTTON**.
2. Dial the number to make a call.

Press the **HEADSET BUTTON** to answer a ringing call.

TRANSFER CALLS

ATTENDED TRANSFER

This type of transfer allows you to speak to the person to whom you are transferring the original call.

1. Press the **XFER/TRNSFER/TRANSFER** {varies by phone model} softkey. The first call will be placed on hold.
2. Enter the number to which you want to transfer the call, then press dial or wait a few seconds.
3. Press the **XFER/TRNSFER/TRANSFER** softkey at any time after the phone is answered. To transfer after speaking privately with the other person, press **XFER/TRNSFER/TRANSFER** again at any time during the conversation.

BLIND TRANSFER

This type of transfer allows you to transfer without speaking to the person to whom you are transferring the original call.

1. Press the right arrow to tab over to the **BXFER/BLINDXFER** {varies by phone model} softkey and press it.
2. Enter the number to which you want to transfer the call, then press **DIAL** and hang up.

hosted phone feature guide

DO NOT DISTURB

1. Press the **DND** soft-key or the DND icon indicating Do Not Disturb is turned on.
2. To deactivate Do Not Disturb, press  the **DND** soft-key.

FORWARD CALLS

1. Press the **CFWD/FORWARD/CFWDALL** soft-key, varies by phone model
2. Enter a number to which to forward calls & press **DIAL**. The screen will display Calls Forwarded.
3. To stop Forwarding Calls, press the **CFWD/FORWARD/CFWDALL** soft-key and the Calls Forwarded message disappears from the screen.

You can also forward calls using the CommPortal web interface. Refer to the phone status section on page 5 of this guide.

THREE-WAY CONFERENCE CALL

1. Press the **CONF/CONFERN** (varies by phone model) soft-key during an active call. The first call is placed on hold and you hear a dial tone.
2. Dial the second person's number
3. Press the **CONF/CONFERN** soft-key again

CALL FORWARD INCOMING CALLS

You can forward an incoming call to a contact or forward all incoming calls to a contact.

TO FORWARD AN INCOMING CALL

1. On the incoming call screen, tap **FORWARD**.
2. **ENTER** your contact's number and tap **FORWARD**.

TO FORWARD ALL INCOMING CALLS

1. Tap **FORWARD**. If you have more than one line, select a line.
2. Choose either **ALWAYS, NO ANSWER*** or **BUSY**.
*If you chose no answer, enter the number of rings before the call is forwarded.
3. **ENTER** a contact's number and tap **ENABLE**.

TO DISABLE CALL FORWARDING

1. Tap **FORWARD**. If you have more than one line, select a line.
2. **SELECT** your forwarding type and tap **DISABLE**.



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Contact our local customer service team at
TOLL FREE
(866) 625-4100

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