Hosted PBX

FARMERS MUTUAL TELEPHONE CO.
Technology Forward

COMMPORTAL QUICK START GUIDE

WELCOME

Welcome to Farmers Mutual Telephone Company (FMTC) Hosted PBX CommPortal. This guide is intended to get you up and running with the basic features associated with the product. For more in-depth information, please see the tutorial videos on our website at fmtc.com/managed-voice-data/.

As always, you can also contact our local customer care team at **support@fmtc.com** and we will be happy to assist you. CommPortal is the web portal used to configure the features on your new phone system. With CommPortal, you can

- View missed calls
- Listen to voicemail messages
- Manage your contacts
- Set up rules to route your calls
- Perform many other functions

To get started, please see the tutorial videos on our website under Resources.

* This Guide is representative and may vary from your individual CommPortal screen.

GETTING ORIENTED

Once you are logged in, you will see the CommPortal Home page:

HOME PAGE

The CommPortal Home page is the main screen for the portal where you can view your Ca ll Manager settings and access a range of other services.

1. Messages and Calls – Click this link to view and retrieve any voicemails
2. Contacts – Import your contacts from Outlook or create new ones, then click on a name to dial
3. Phone Status - Control your Call Manager settings
4. Make Call – Make a call direct from CommPortal
5. Security - Use these links to change your password or *security* email address
6. Downloads – Download apps, for example MaX UC Desktop
7. Send Feedback – Report bugs or make suggestions for improvements to the CommPortal interface
8. Your Services – Use these links to access a range of services available with your CommPortal account, for example to change your call, message and notification settings, or set up a Reminder call.

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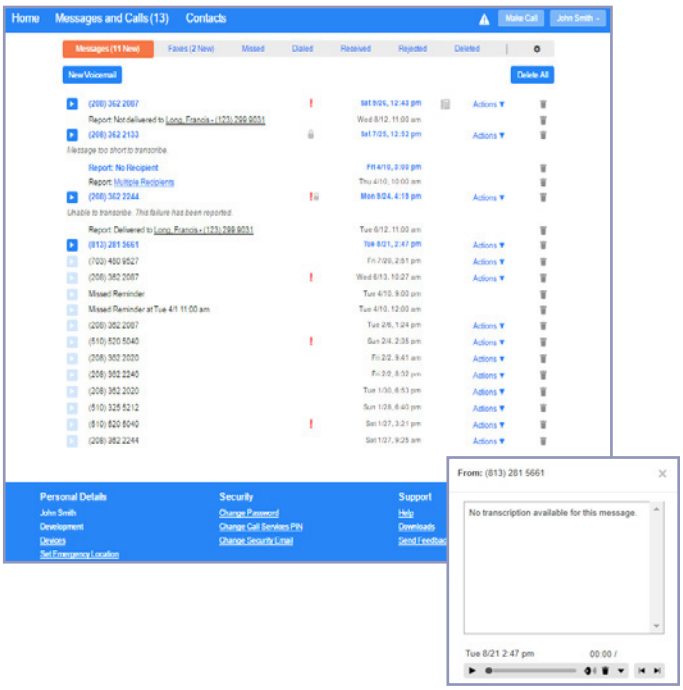
MESSAGES AND CALLS



The **Messages** and **Calls** tab displays all recent call activity. Here you can retrieve voicemails and view calls based on whether they were missed, received, dialed, or deleted.

Click on one of the sub-tabs to get more detail. From the **Missed, Dialed**, and **Received** tabs you can click on the name and either call them, add them to your contacts, or jump to the caller's existing contact information.

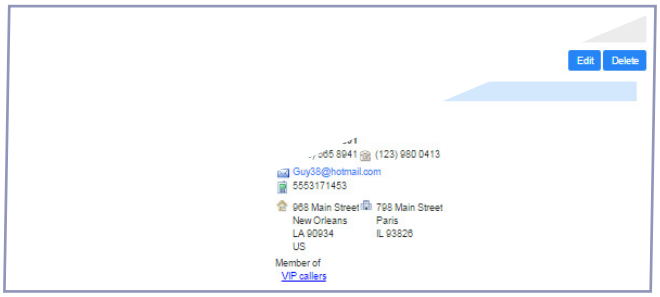
Use the **Action** drop-down alongside each message to mark as Heard (or) New, Forward as Email, or Forward as Voicemail, or click the trash icon to delete it.

Click the 'play' arrow button to listen to a voicemail. Note that you can listen to your voicemails in any order. A window (as shown over the Messages and Calls screen) will open to display the Voicemail player where you can listen to and manage the message.

Click the '**New Voicemail**' button at the top of the page to record and leave a voicemail as a memo. Your computer must have a microphone to use this function.

CONTACTS

The Contacts page enables you to manage all of your contact information. Within it, you can create new contacts using recent call information like a missed call, or create a new one from scratch. You can also create groups of contacts, or import/export your contacts.



The fastest way to add your contacts is to import them from your email program. If you use Microsoft Outlook, follow these instructions:

- Open Outlook and go to the '**File**' tab – then '**Import and Export**'
- A new window should appear
- Select **Export to File** – click **Next**
- Select **Comma Separated Values** from the list and click **Next**
- Select **Contacts** from the folder tree and click **Next**
- Save exported file as '**Outlook Contacts**' and click **Next** – save in a place you can easily locate such as the Desktop or My Documents
- Go back to the CommPortal Contacts page
- Click the **Import** button
- Click the **Browse** button to find the '**Outlook Contacts**' file
- Click **Import**
- Your contacts are now in CommPortal!

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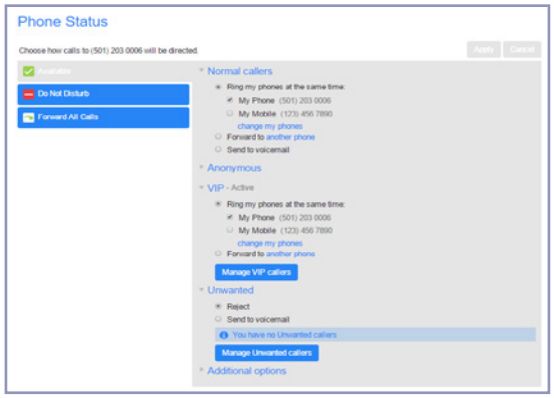
CALL MANAGER

The Phone Status panel in the center of the CommPortal Home page displays your Call Manager where you can set your availability status and manage how incoming calls are routed to you.



The top section on the left enables you to change your setting from '**Available**' to '**Do Not Disturb**,' allowing you to route calls directly to voicemail if you're busy. There is also a forwarding option that enables simultaneous ring with your mobile device.

The panel on the right allows you to set up how calls from various different types of callers are handled. You can use options on this screen to add numbers to VIP and Unwanted callers lists.

DOWNLOADING APPS

You can use the Downloads link, located at the foot of the CommPortal Home page, to access a range of apps that you can download onto your computer or your mobile phone or tablet or phone so that you can always have access to the key CommPortal features on your desktop or mobile device.

MORE QUESTIONS?

Find out how FMTC Hosted PBX can make your business more productive. Email **support@fmtc.com**, call us at **208-452-2000** or visit fmtc.com/hosted-hpbx/.

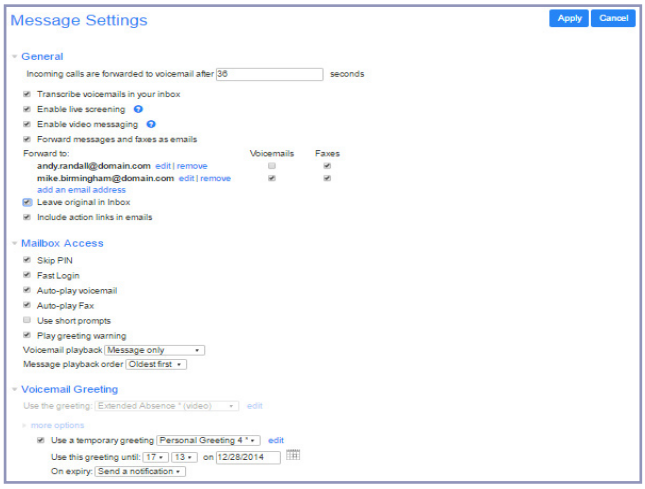
CHANGING SETTINGS

The panel at the bottom of the CommPortal Home page allows you to make various changes to your settings.

For example:

— To configure your phone according to your preferences, use the **Devices** link. On the screen that appears, use the '**set keys**' link to configure your phone according to your preferences.

— To change your password and/or PIN, or your security email address, click on the links under Security at the bottom of the Home page.

The **Call Settings** page allows you to control various call settings, for example withholding your caller ID and configuring Call Forwarding, Call Blocking or Call Jump settings.

The **Messaging Settings** page enables you to control how your messages are handled, for example you can manage mailbox settings, customize how you are notified of a voicemail, configure greetings, and more. Using Voicemail Greetings you can personalize your voicemail greeting by recording an announcement (A microphone is required for this option).