airespring™

Cloud Hosted IP PBX

Basic ECM User Training

Welcome!

- Welcome to AirePBX
- This Basic User training is designed to help you get comfortable with your new Cloud Hosted IP PBX.
- With an amazing number of features the AirePBX System will empower you to be more efficient in your day to day activities.

Ready Start!

- AireSpring created this Ready Start! Guide to assist you with the initial setup of your AirePBX Basic Easy Call Manager User.
  - Setup Voicemail Greetings.
  - Overview of frequently used CommPortal functions.

Resources

- User Information Page.
  - This page contains links to a number of documented resources like phone guides and CommPortal training.
  - Airespring.com/ip-PBX-customer
- CommPortal
  - Online web based portal to manage your voicemail, contacts and call features, such as Simultaneous Ring.
  - https://commportal.airespring.com/#login.html
- Customer Care
  - 888-288-5010

AirePBX Components

- The Phones
  - There are a number of different phone options with the AirePBX.
  - Quick guide reference information for your specific model can be found on the user information webpage.
- Voicemail
  - Accessible through your phone, remotely and online via the web CommPortal.
- CommPortal
  - Online web portal which allows you to:
    - Access your voicemail
    - Set up voicemail for email forwarding or notification
    - Set up Easy Call Management, Simultaneous Ring, Forward, etc.
    - Retrieve contact information
    - View Received, Missed, and Dialed calls and faxes
    - And use many other features.

Voicemail

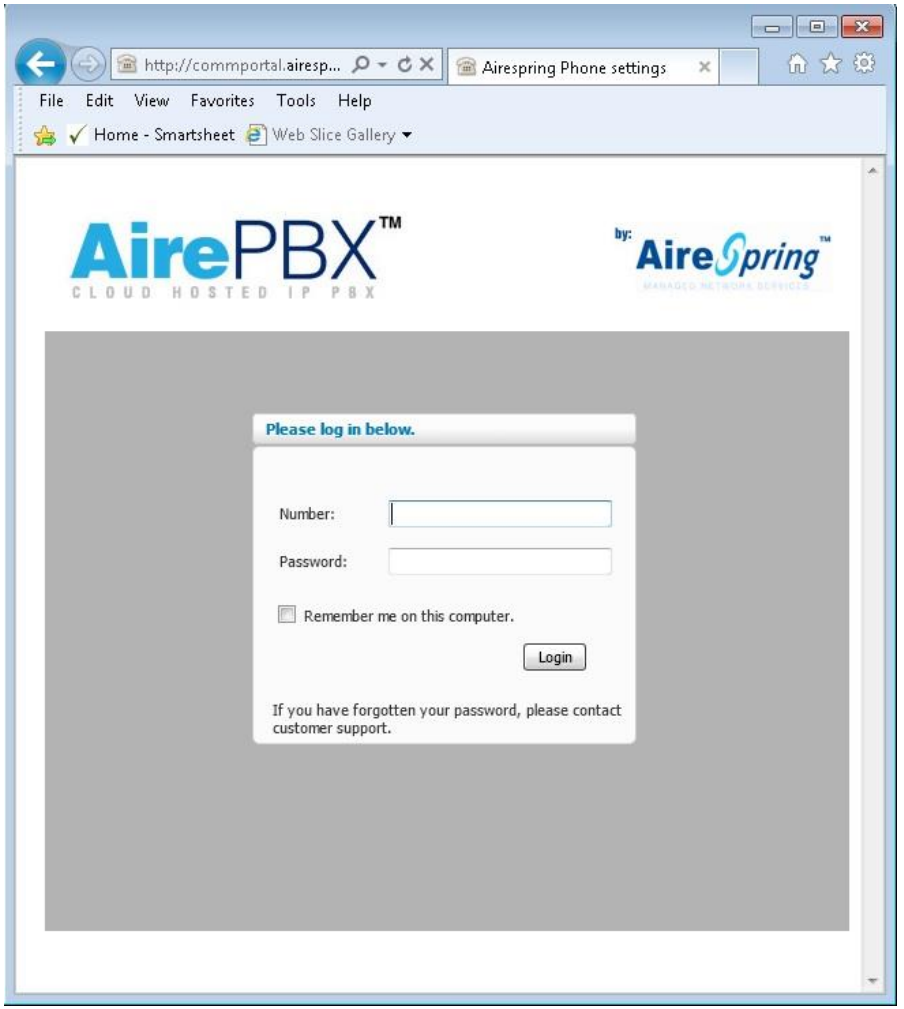
- Voicemail Access
  - Via your SIP Phone dial *98
  - Via remotely:
    - Call your office telephone number.
    - When your greeting answers push the * button.
    - You will then be prompted to enter your PIN.
- First Time Login
  - You will receive prompts for the following actions:
    - Recording your greeting
    - Recording your name
    - Changing your PIN
      - Must be between 6 and 20 digits long
      - Cannot be part of your telephone number
      - Cannot repeat a single digit more than two (2) times
      - Cannot be a sequence of numbers such as “123456”

CommPortal

- CommPortal is an online portal which allows you to manage your communications from anywhere you have Internet Access.
- Enables you to do the following actions:
  - Access voicemail
  - Set up voicemail for email forwarding or notification
  - Set up Easy Call Management, Simultaneous Ring, Forward, etc.
  - Retrieve contact information
  - View Received, Missed, and Dialed calls and faxes
  - And use many other features
- Note that you will still be able to use many of the * code features you used previously.

Logon to CommPortal

- Go to: http://commportal.airespring.com/#login.html
- You will be prompted for:
  - Number
  - Password



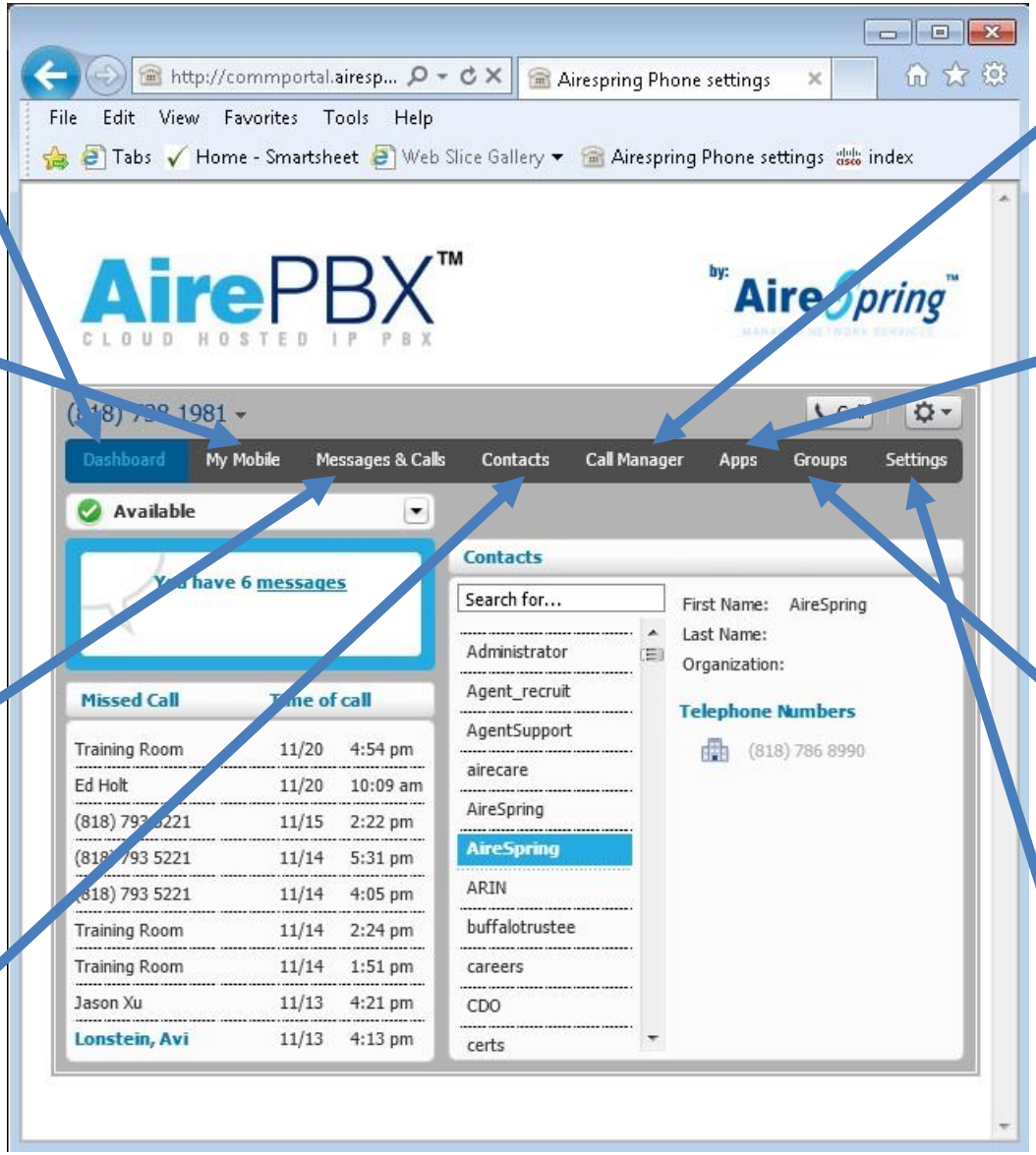
CommPortal ECM Basics

Overview of Messages, Calls, & Settings

Mobile Phone

Messages & Call History

Store, Create, & Retrieve Contact Info



Manage Incoming Call Treatment

Download Desktop Apps & Widgets

If applicable Call Pickup Groups & MLHGs

Access & Change Call Service settings

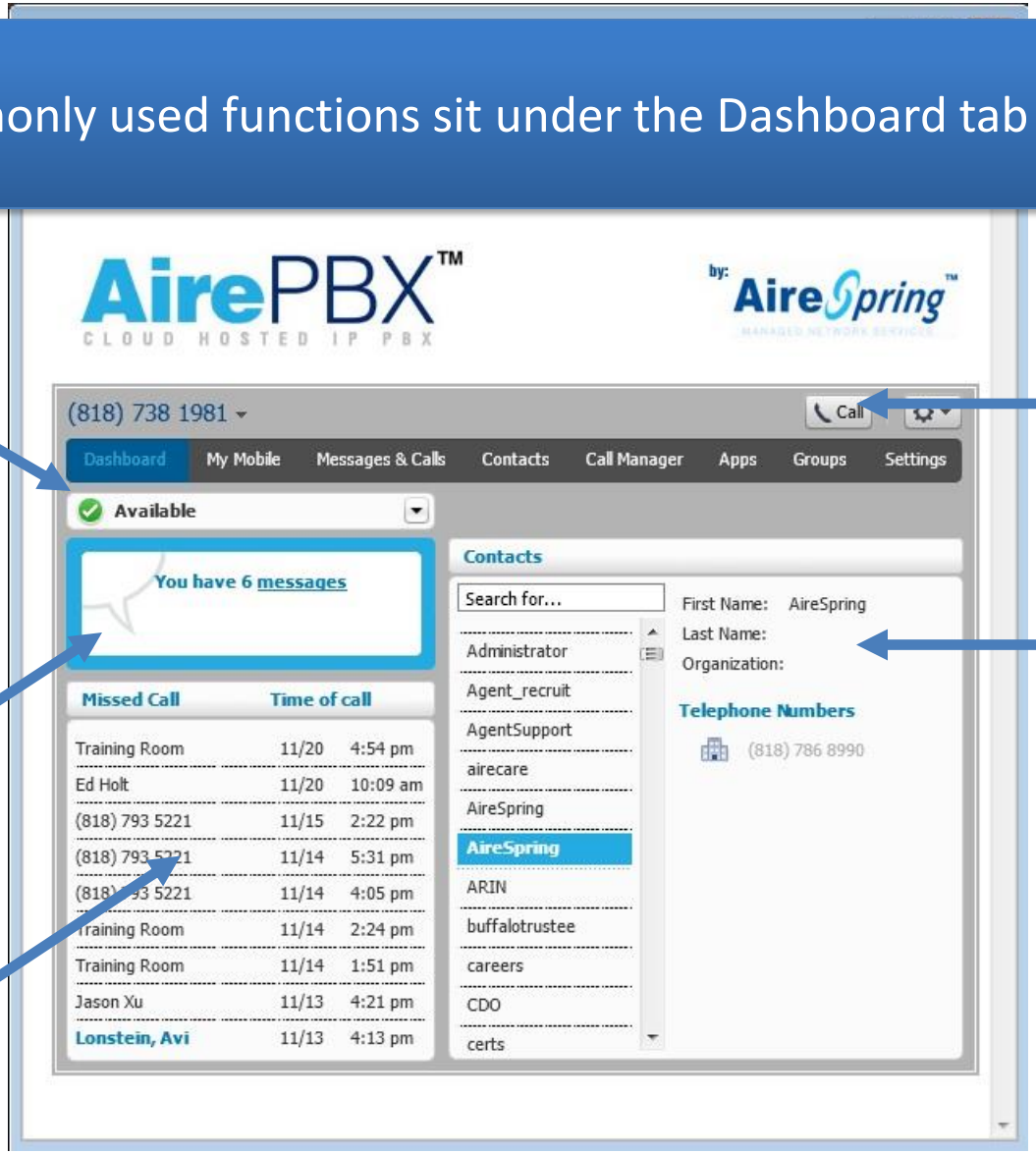
ECM Dashboard

The most commonly used functions sit under the Dashboard tab when logged in.

Current Incoming Call Choice

Voicemail Access

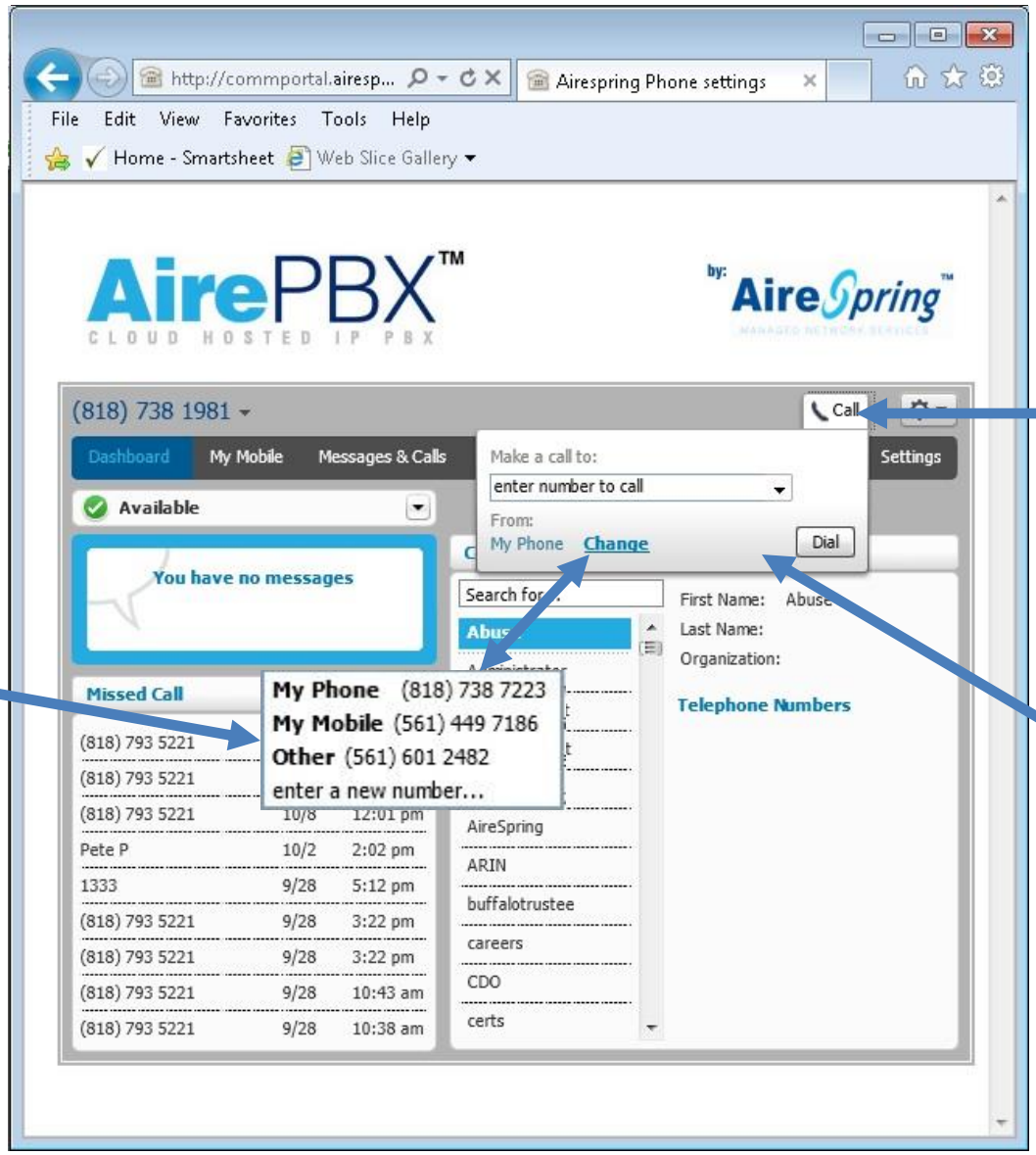
Missed Call Log



Click2Dial

Contact List and Details

Click2Dial



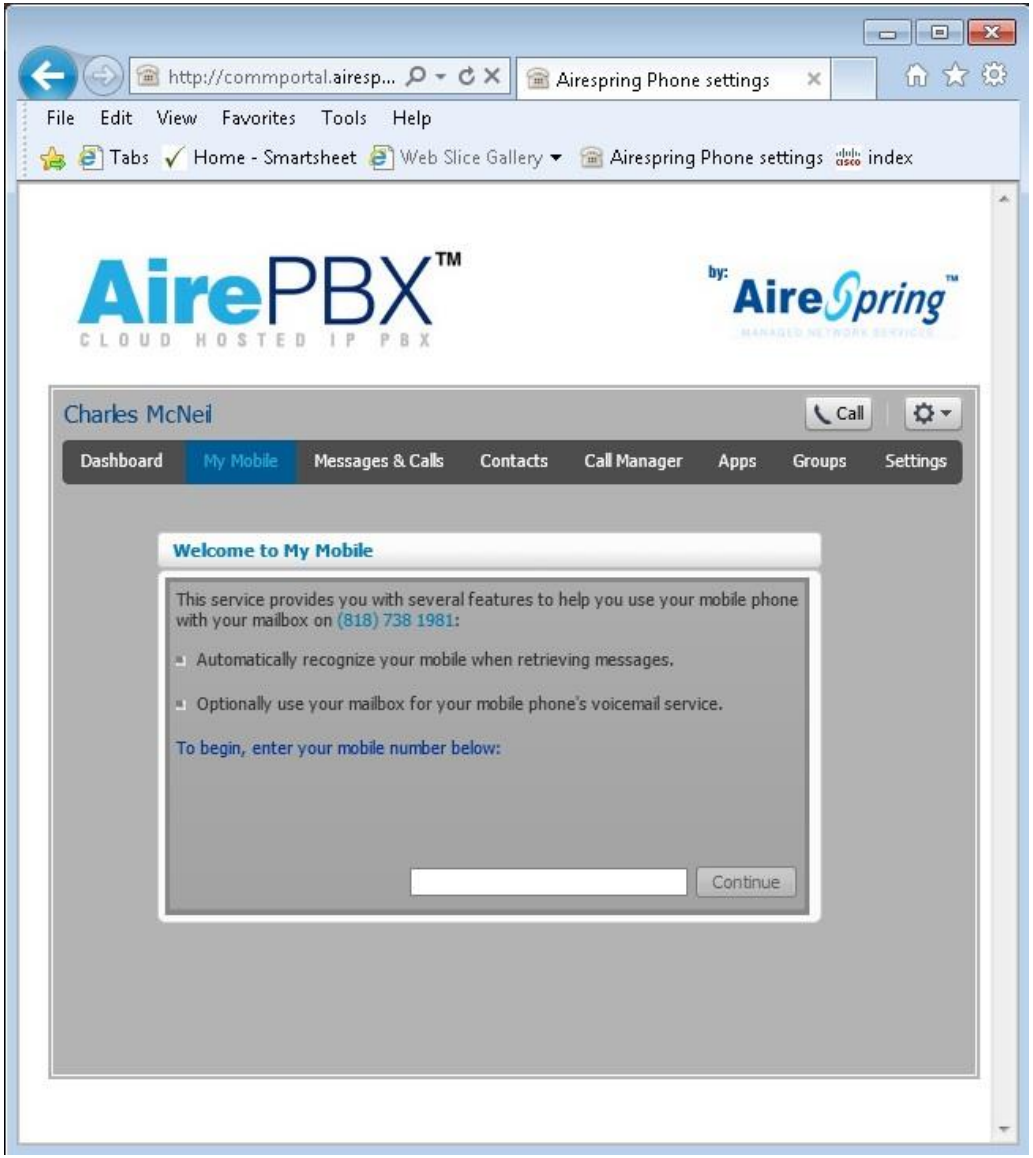
Select another phone from the pop up to change the phone you are calling from

Click2Dial

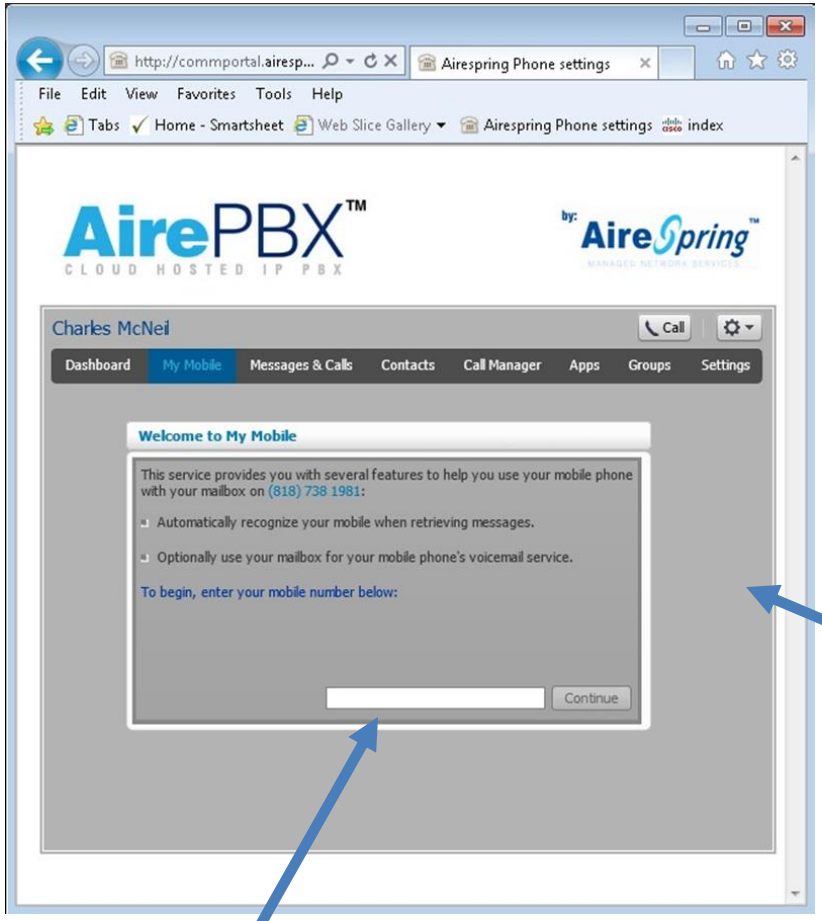
Enter number to call and click dial. Your phone will ring and the number will be called

My Mobile Tab

- Add or remove your mobile number.
- Fuse your mobile voicemail to your AirePBX Voicemailbox
  - Mobile provider VM forwarding instructions
- Mobile Setting Options

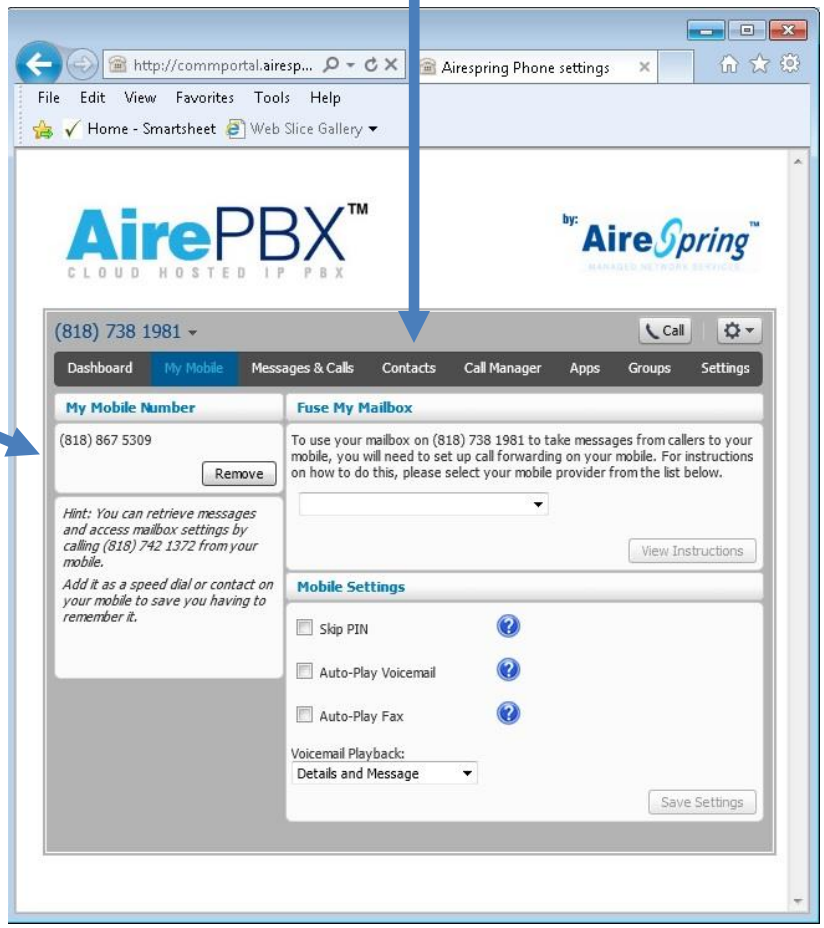


My Mobile Tab Cont.



Enter your mobile number

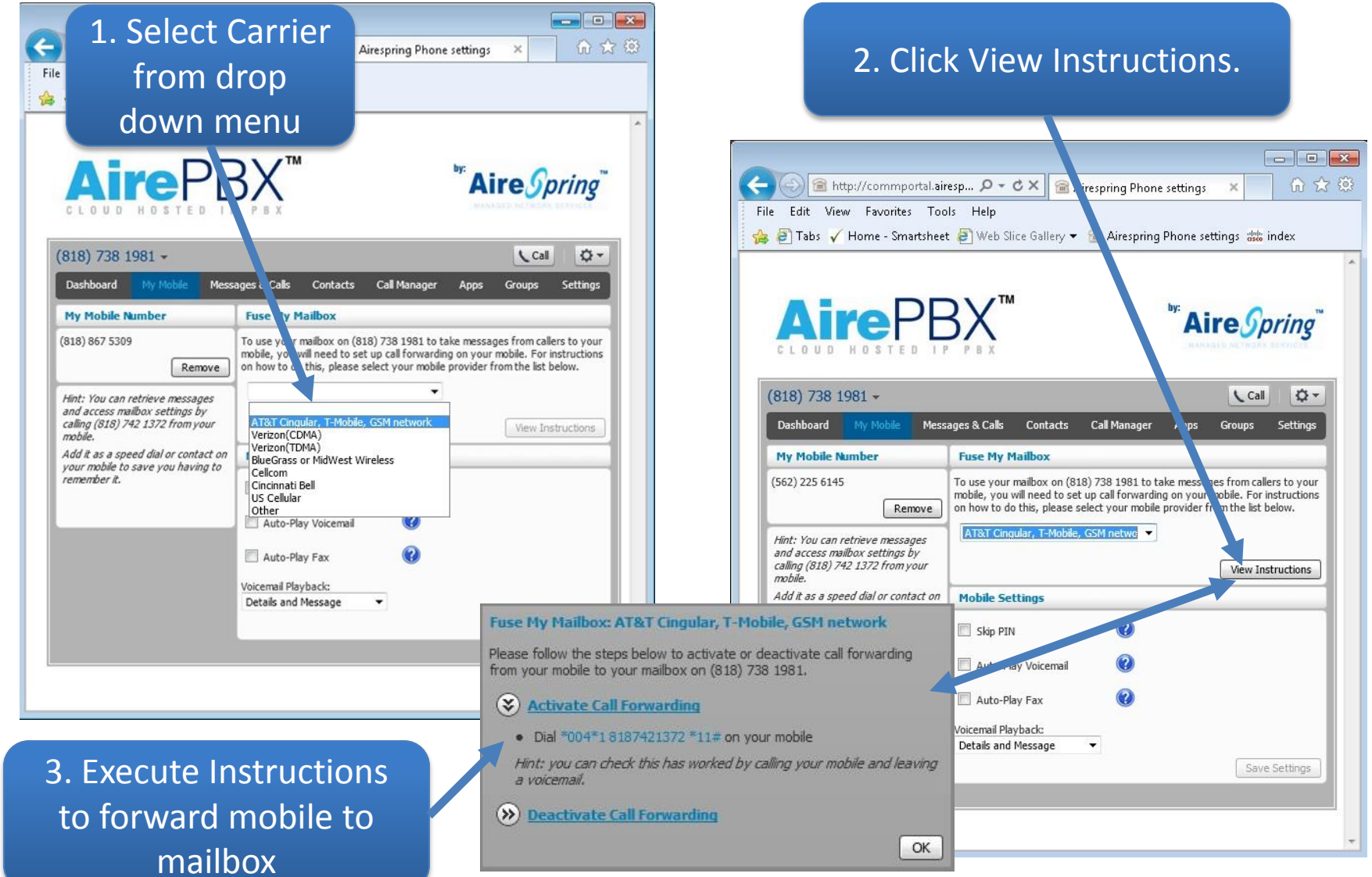
Once a mobile number is entered Tab Page will change



Fuse My Mobile

1. Select Carrier from drop down menu

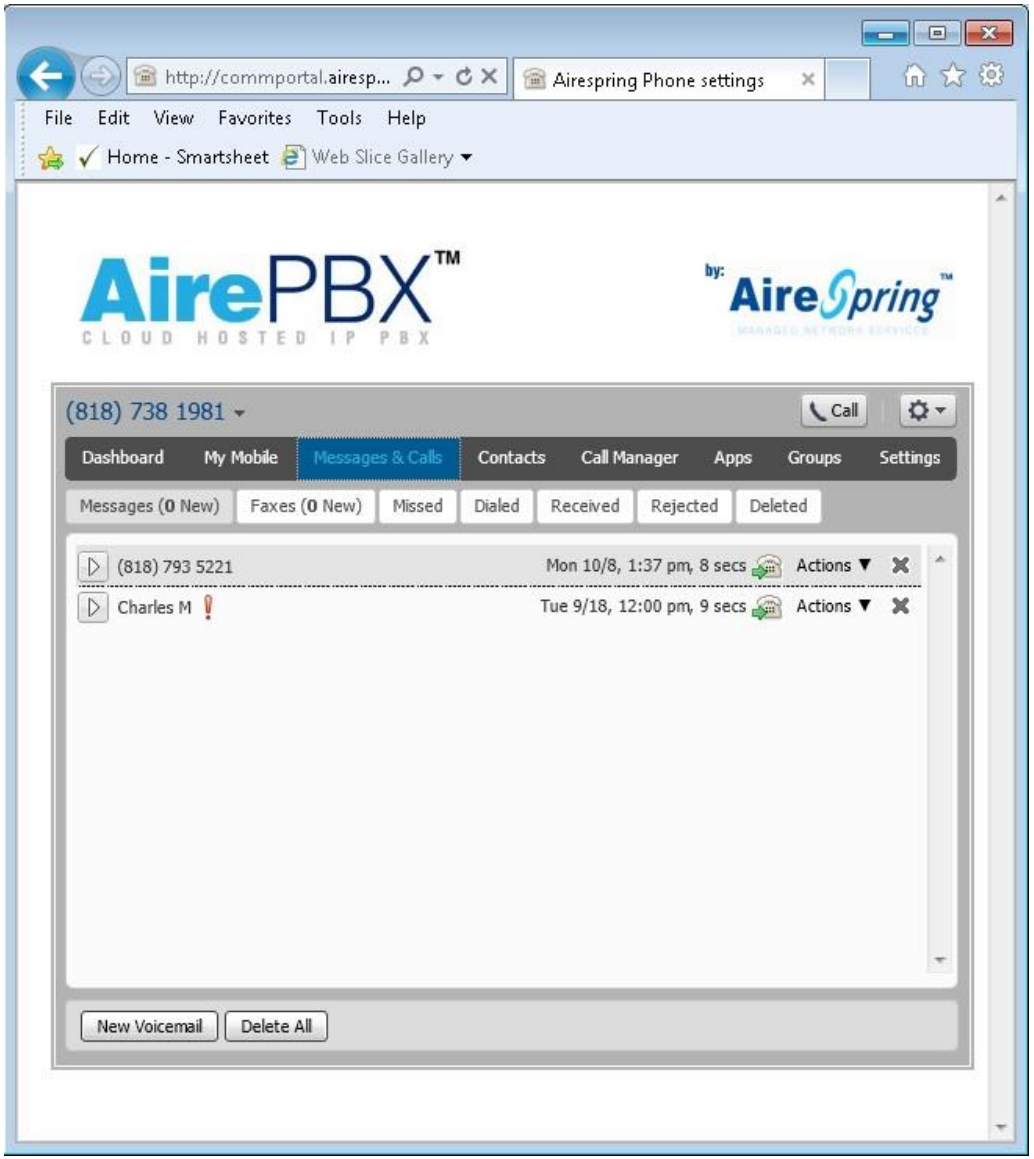
2. Click View Instructions.



3. Execute Instructions to forward mobile to mailbox

Messages & Calls Tab

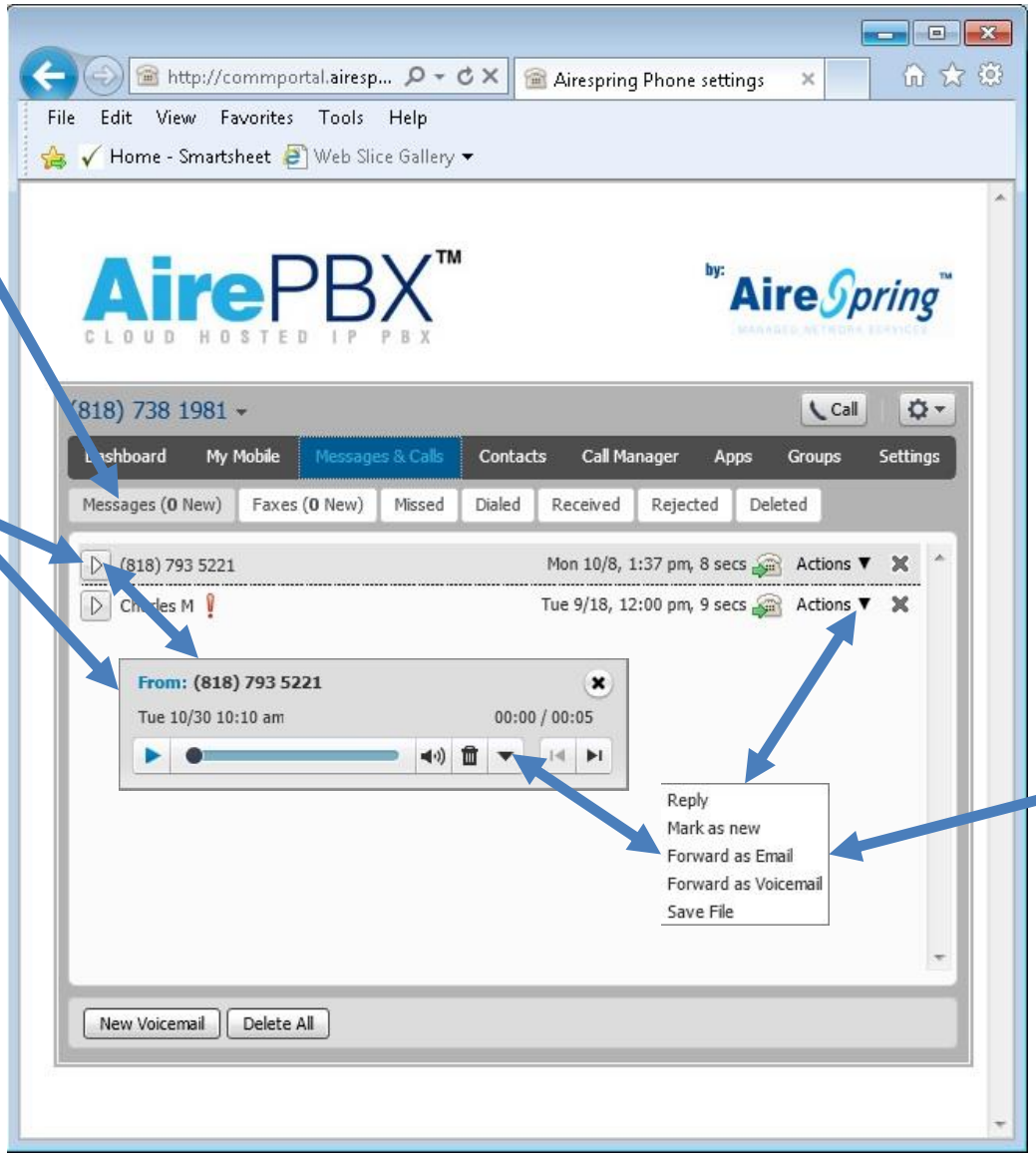
- Spring through your Voicemails.
  - Listen to voicemail in any order you choose by clicking the arrow next to the number or name.
- Additional sub tabs to view:
  - Faxes
  - Missed Calls
  - Dialed Calls
  - Received Calls
  - Rejected Calls
  - Deleted Messages



Messages & Calls Cont.

Missed Calls Sub Tab

Click VM Arrow Button to launch VM Pop Up

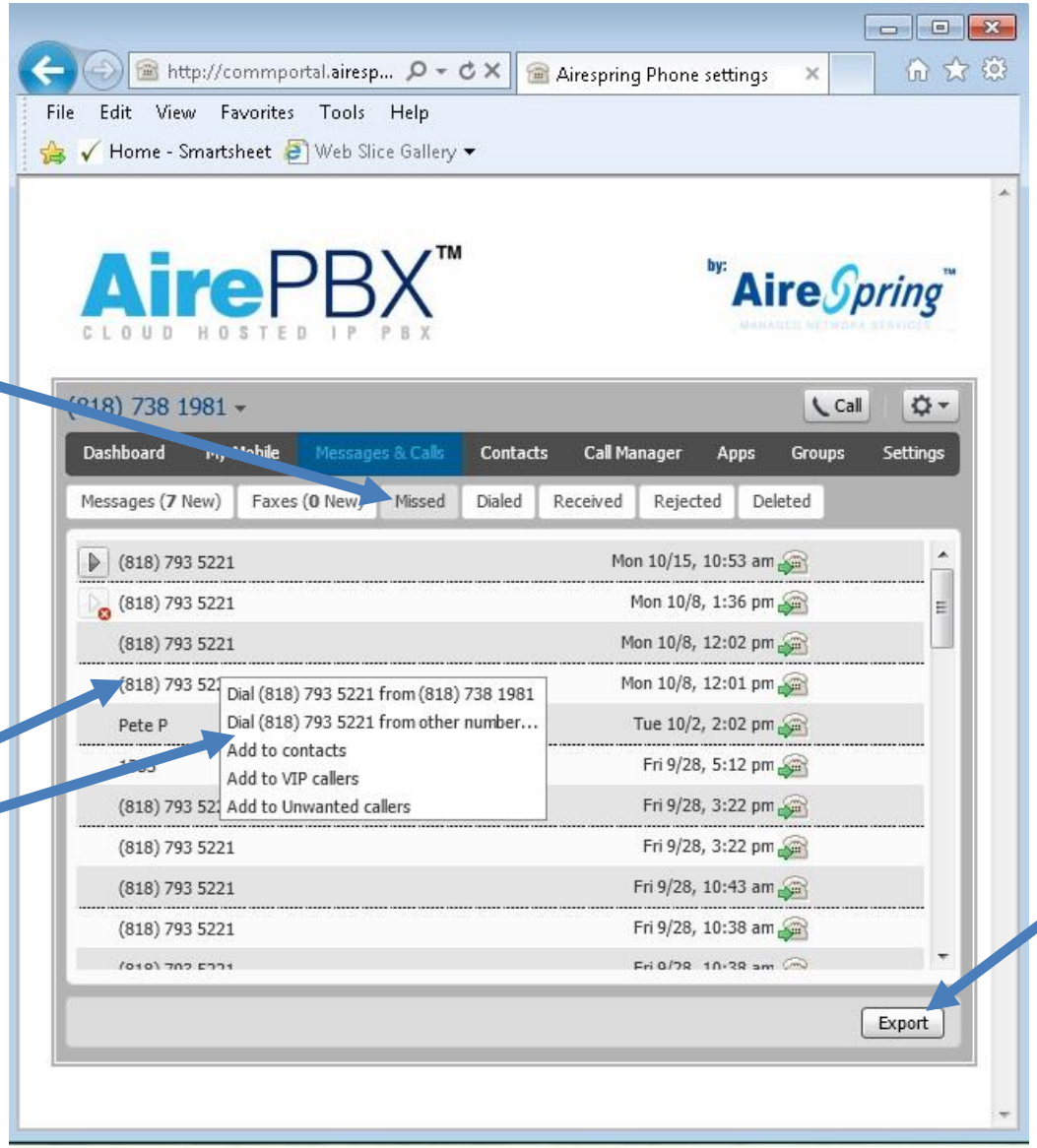


Actions Button launches Pop Up Menu. Forward as Email or VM etc.

Messages & Calls Cont.

Missed Calls Sub Tab

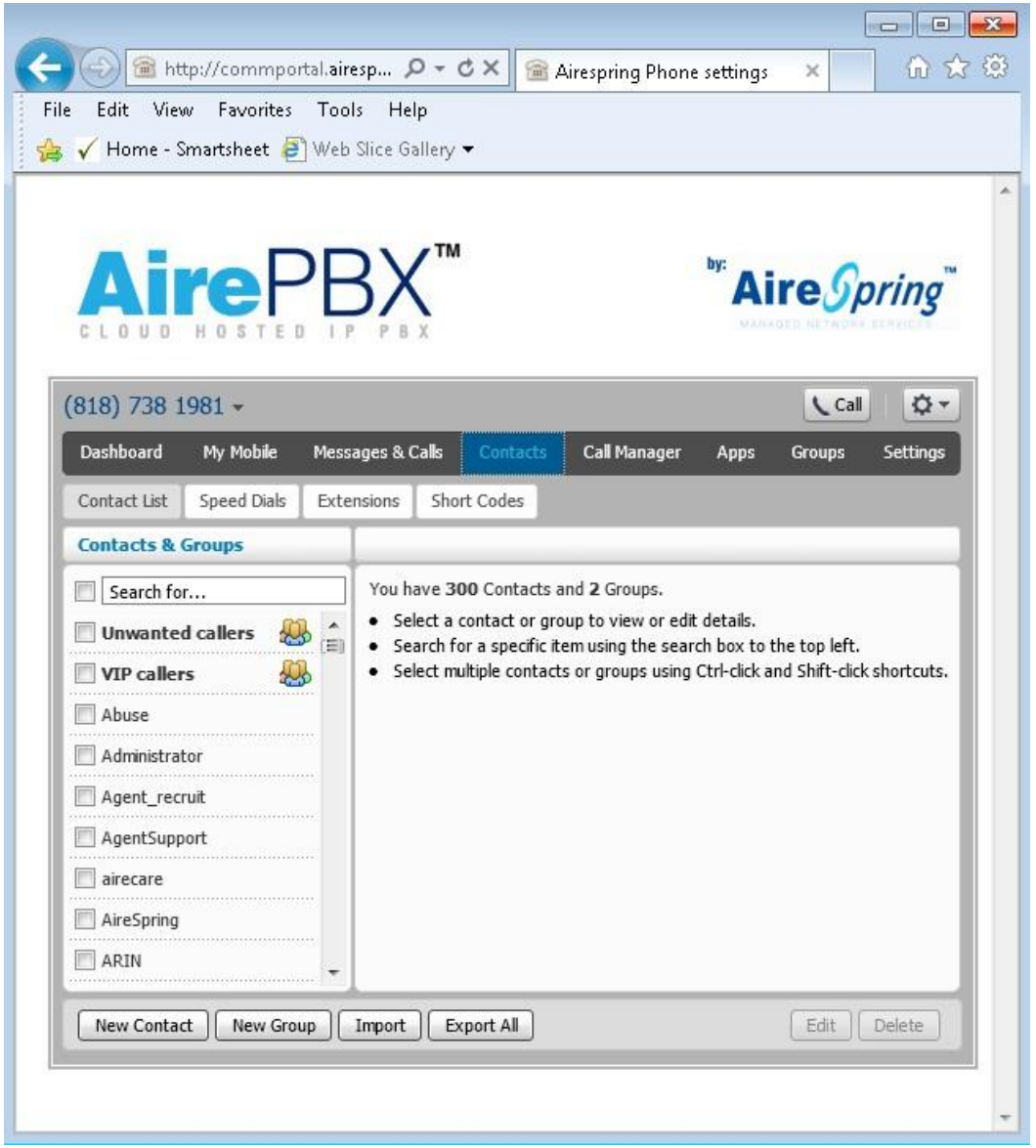
Click2Dial number to call back or create contact



Export to Excel list of Incoming Calls

Contacts Tab

- Allows storage of contact information in the portal to easily ID callers within call list and to use the Click2Dial feature.
- Add new contacts manually or by importing a csv file.
- Export contacts from portal to Outlook or Excel.

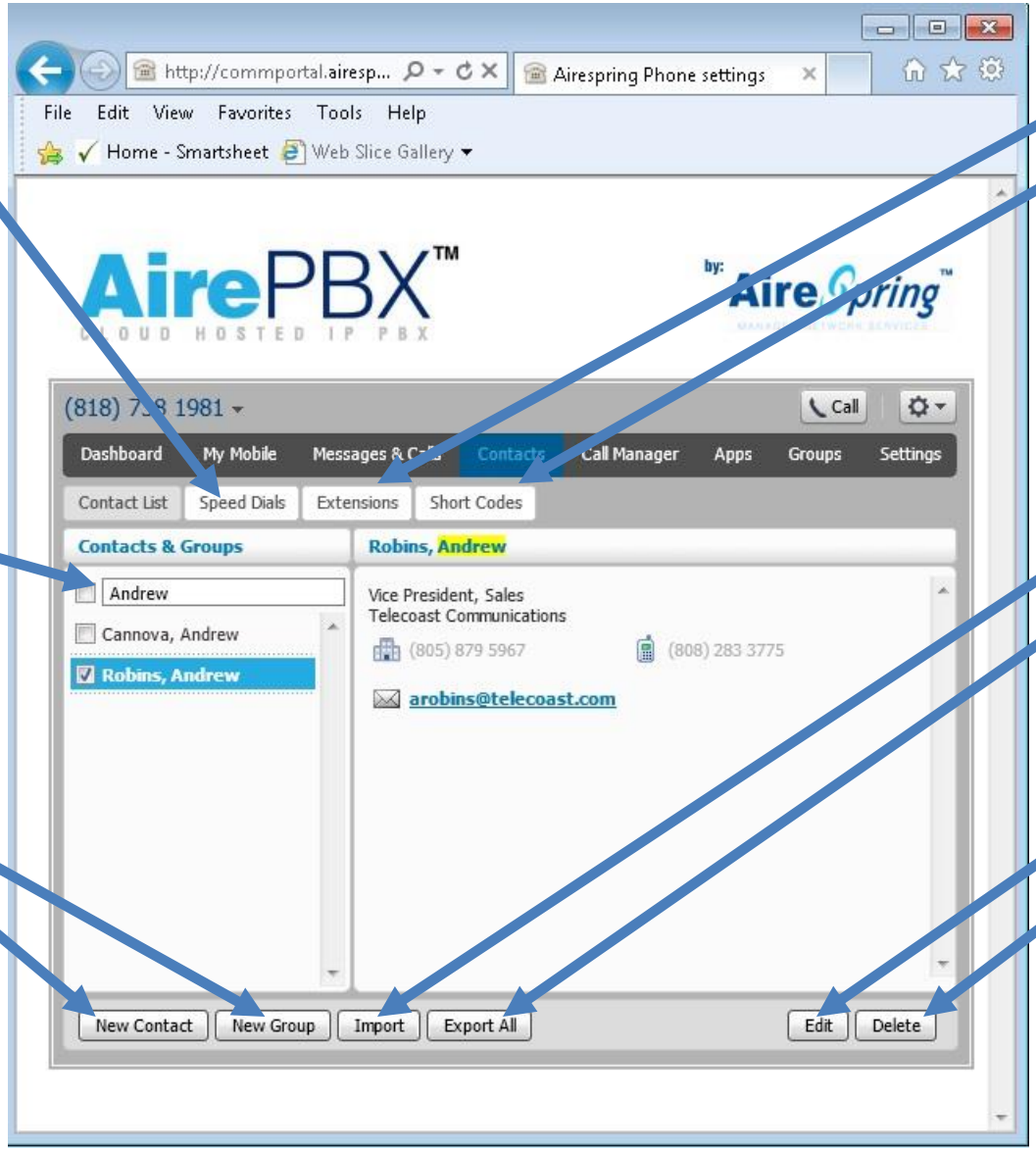


Contact Sub Tabs

Create two digit speed dial for frequently called numbers

Search for a Contact within Contacts

Create new Contacts and Groups



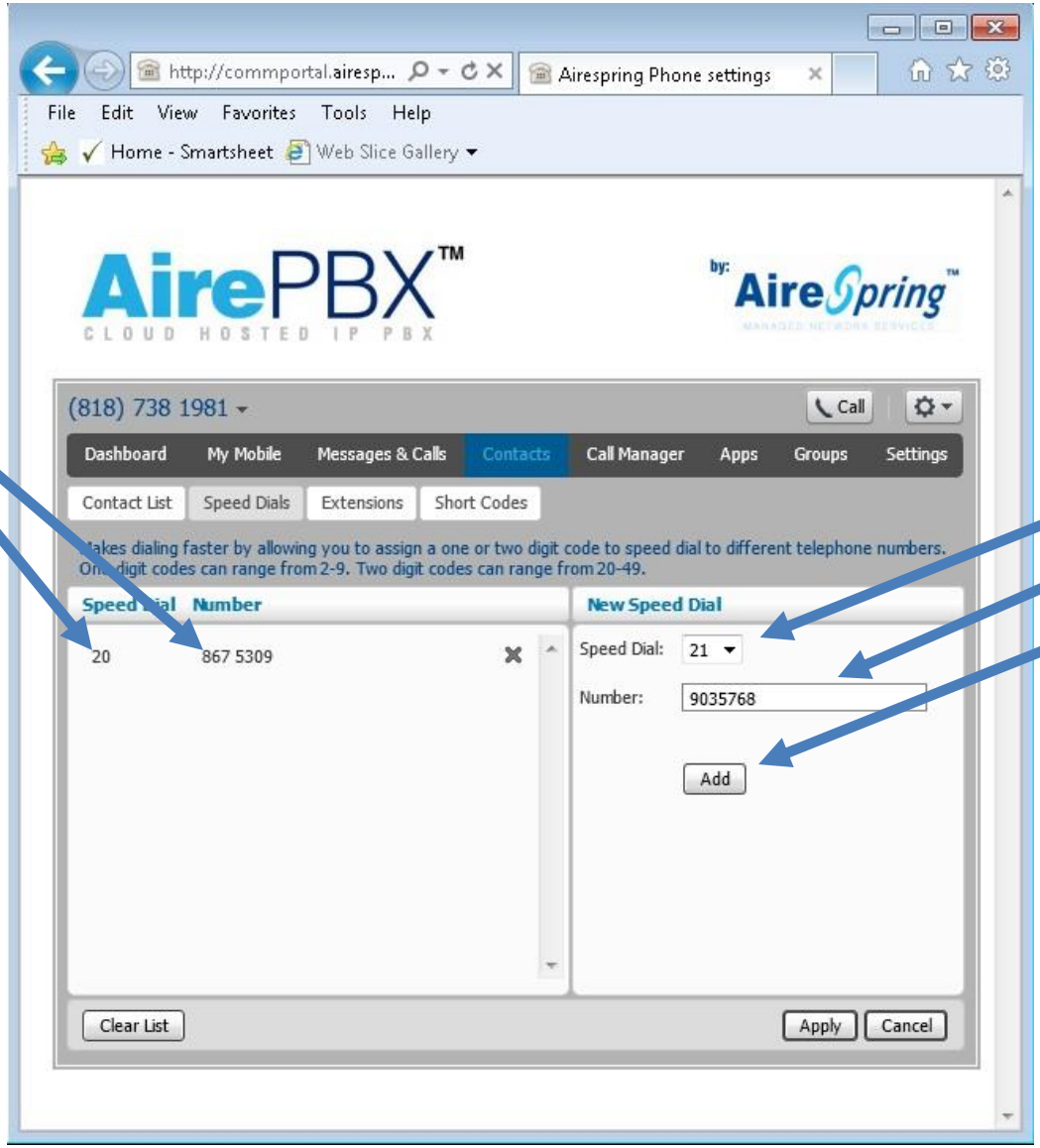
Extensions and Short Codes are created by Business Group Admin

Import or Export Contacts from other apps

Edit or Delete Contacts

Speed Dials Sub Tab

Speed Dial code and associated number



Enter number and code to be assigned, then click button to add

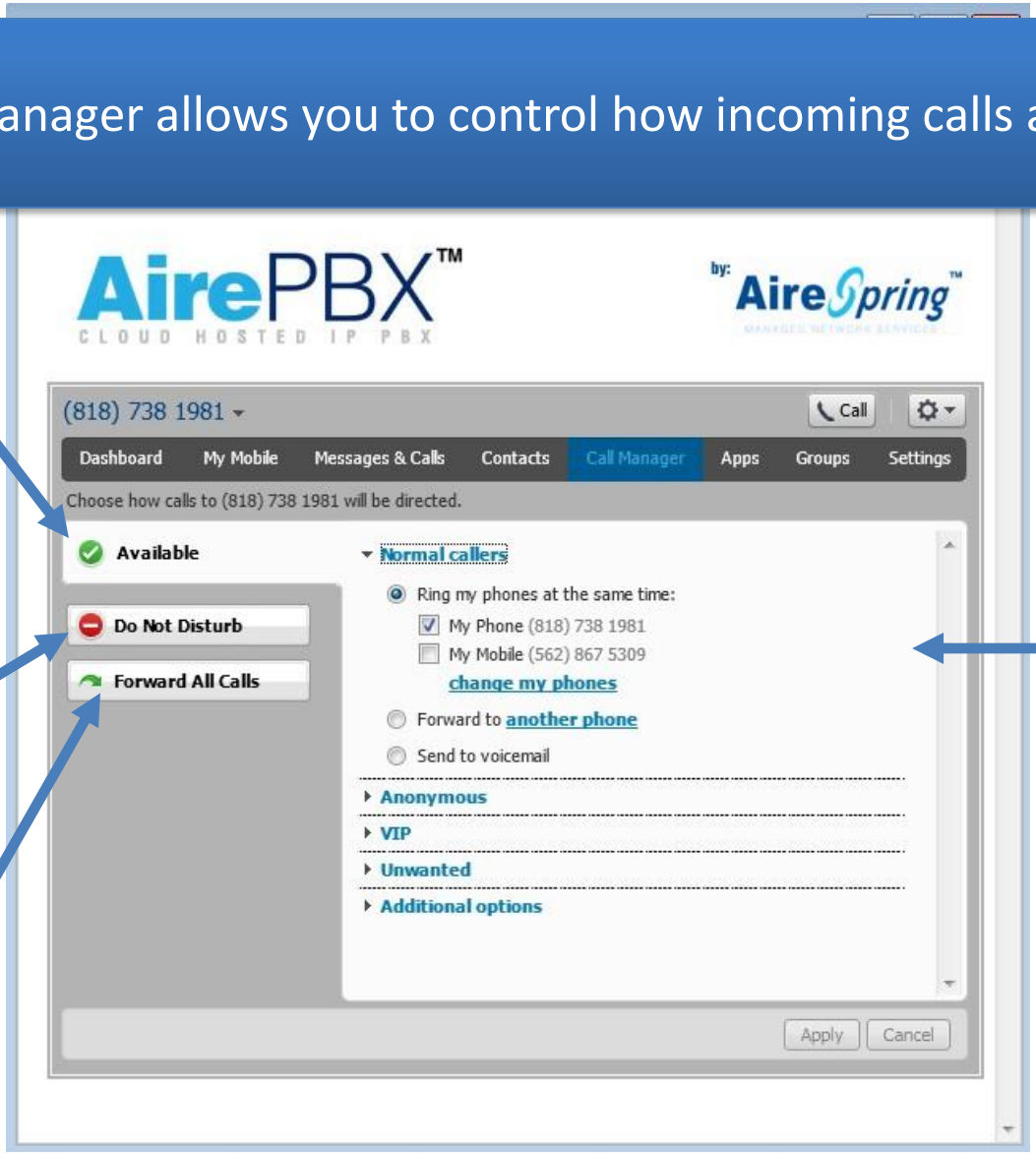
Call Manager Tab

Easy Call Manager allows you to control how incoming calls are handled

Current Status

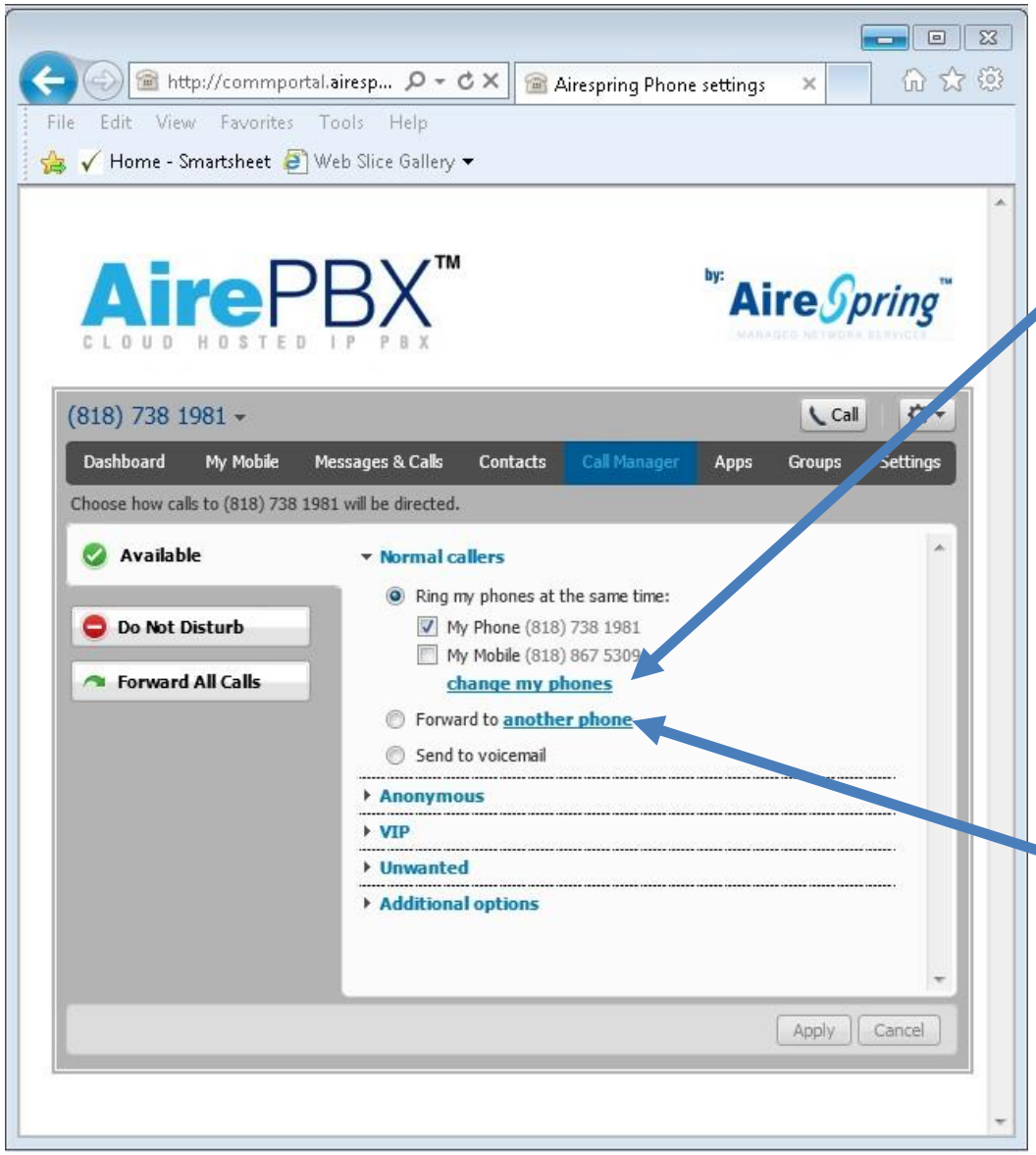
Click to turn on Do Not Disturb

Click to turn on and enter forwarding number



Current Normal Call Handling and additional option choices

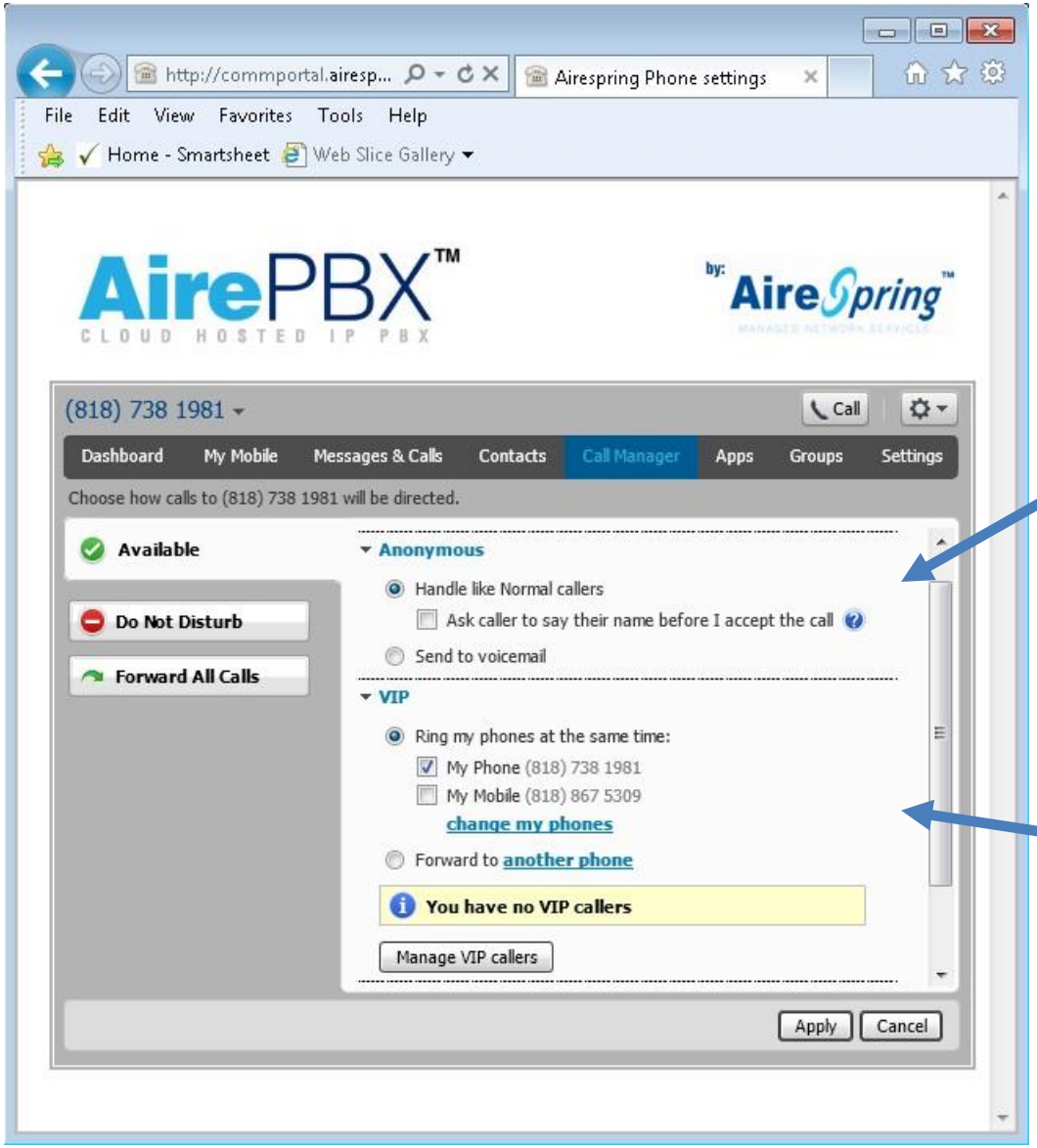
Normal Callers Additional



Pop up window for Change My Phones (add, delete phones to ring simultaneously) .

Pop up window for Another Phone to enter number to be forwarded to.

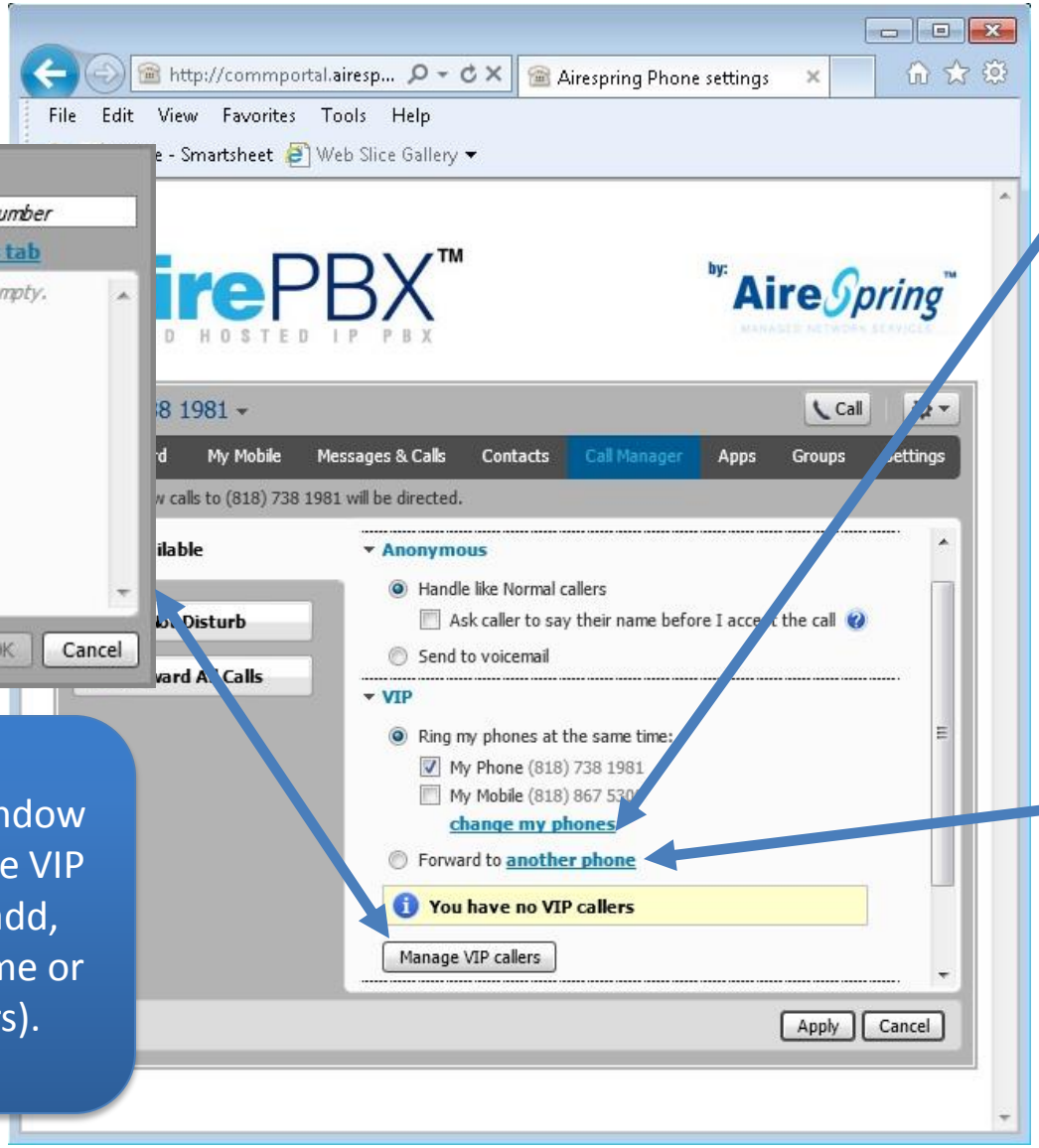
Anonymous & VIP Callers

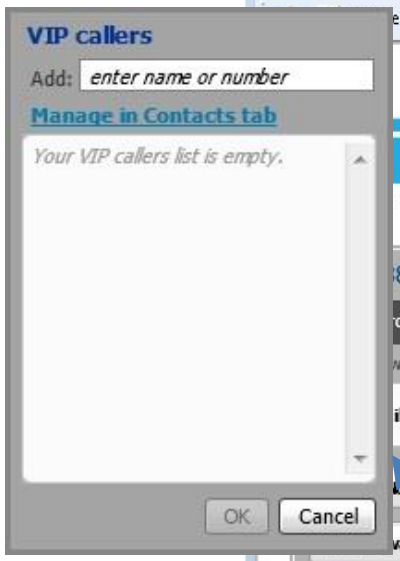


Anonymous Call Handling options

VIP Call Handling options

VIP Caller Additional



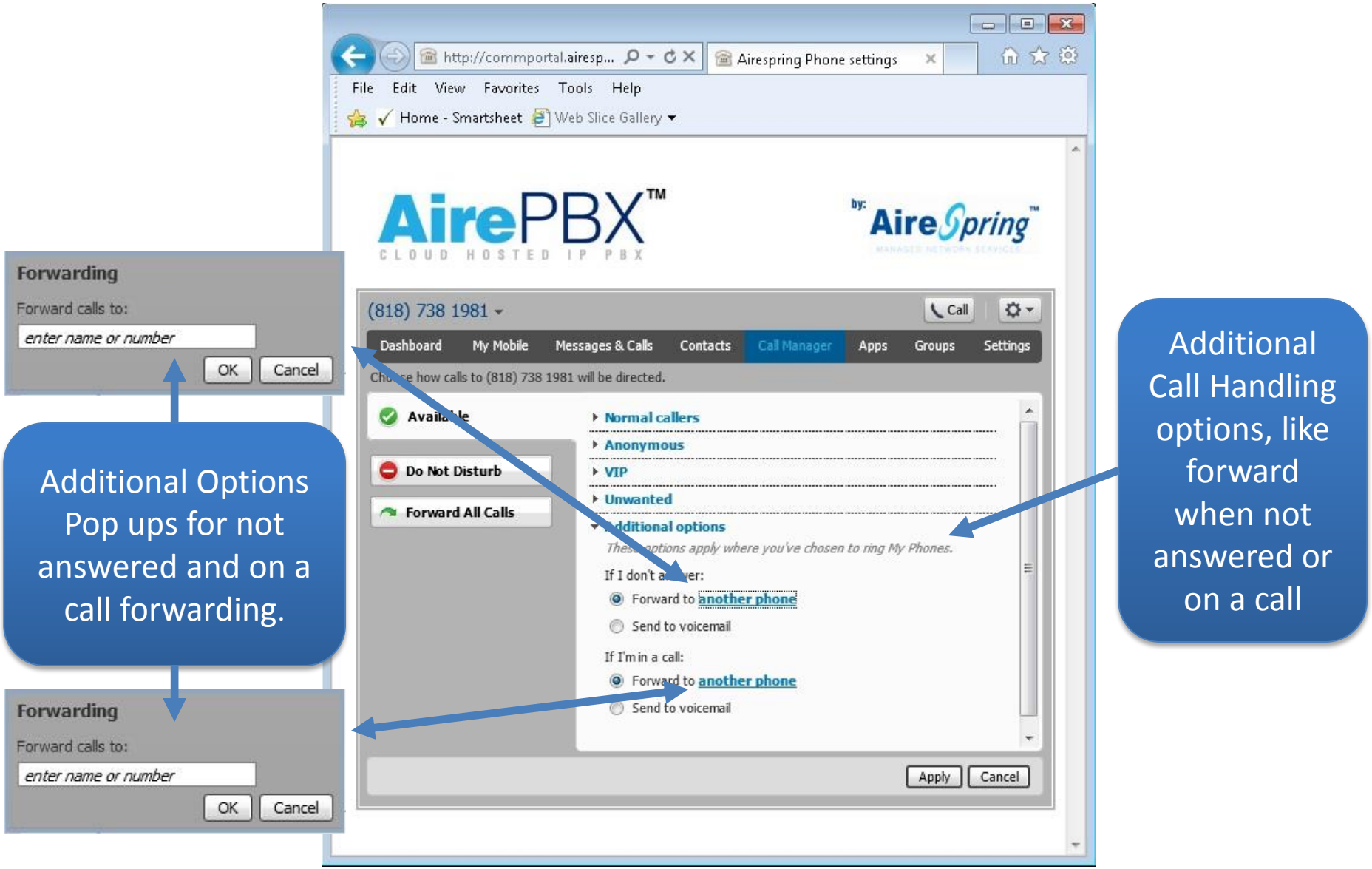


Pop up window for Manage VIP Callers (add, delete name or numbers).

Pop up window for VIP Callers Change My Phones (add, delete phones to ring simultaneously).

Pop up window for VIP Caller Another Phone to enter number to be forwarded to.

Additional Options



Apps

Call Me button can be added to email signatures

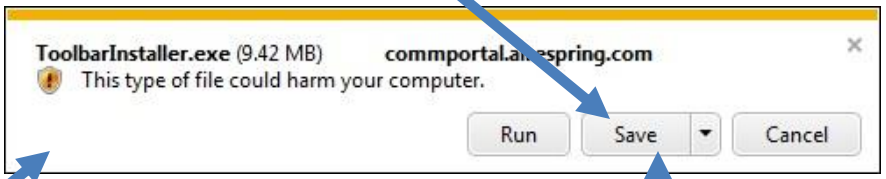
Download Desktop App of CommPortal

Desktop Dashboard Apps:
Dialer
Voicemail
Call Lists

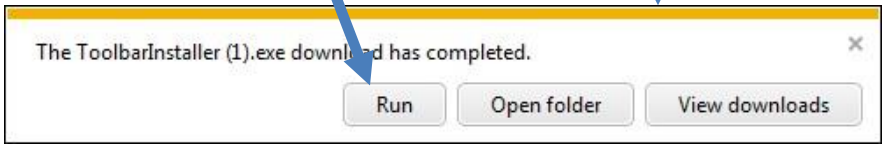
CommPortal Assistant

1. Click to download desktop app of CommPortal Assistant

2. Click Save on Windows Security Pop Up



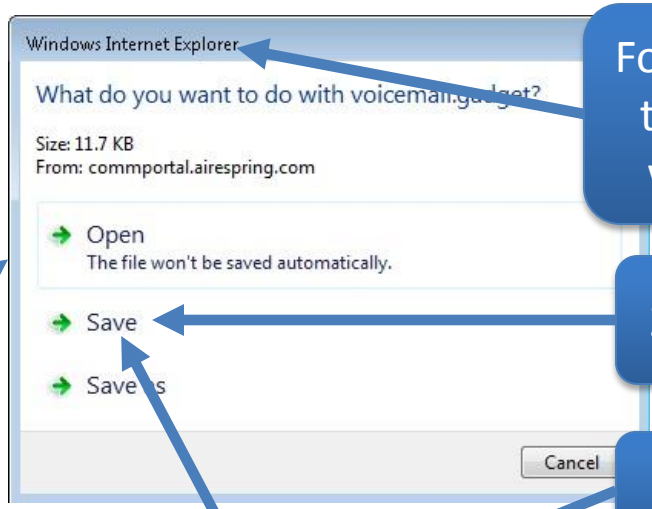
3. Click Run on Windows download Pop Up



4. Follow instructions from the Windows Installer Pop Up

Voicemail Widget

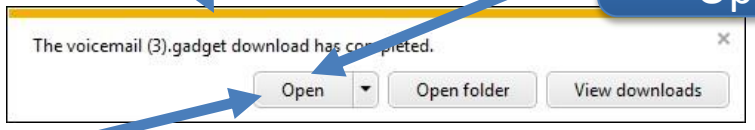
1. Click on System you want to download Widget to.

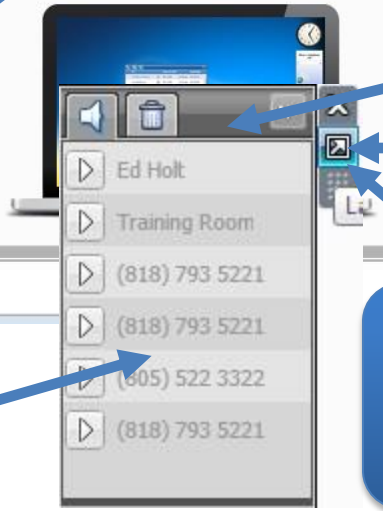


For Window 7 this Pop Up will launch

2. Click Save

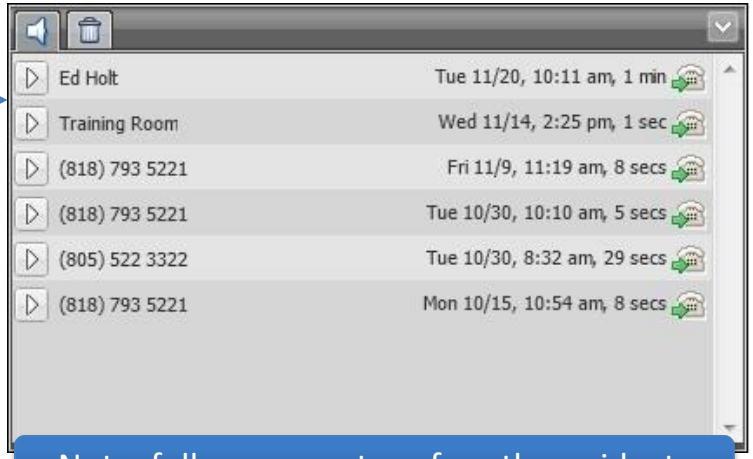
3. Click Open





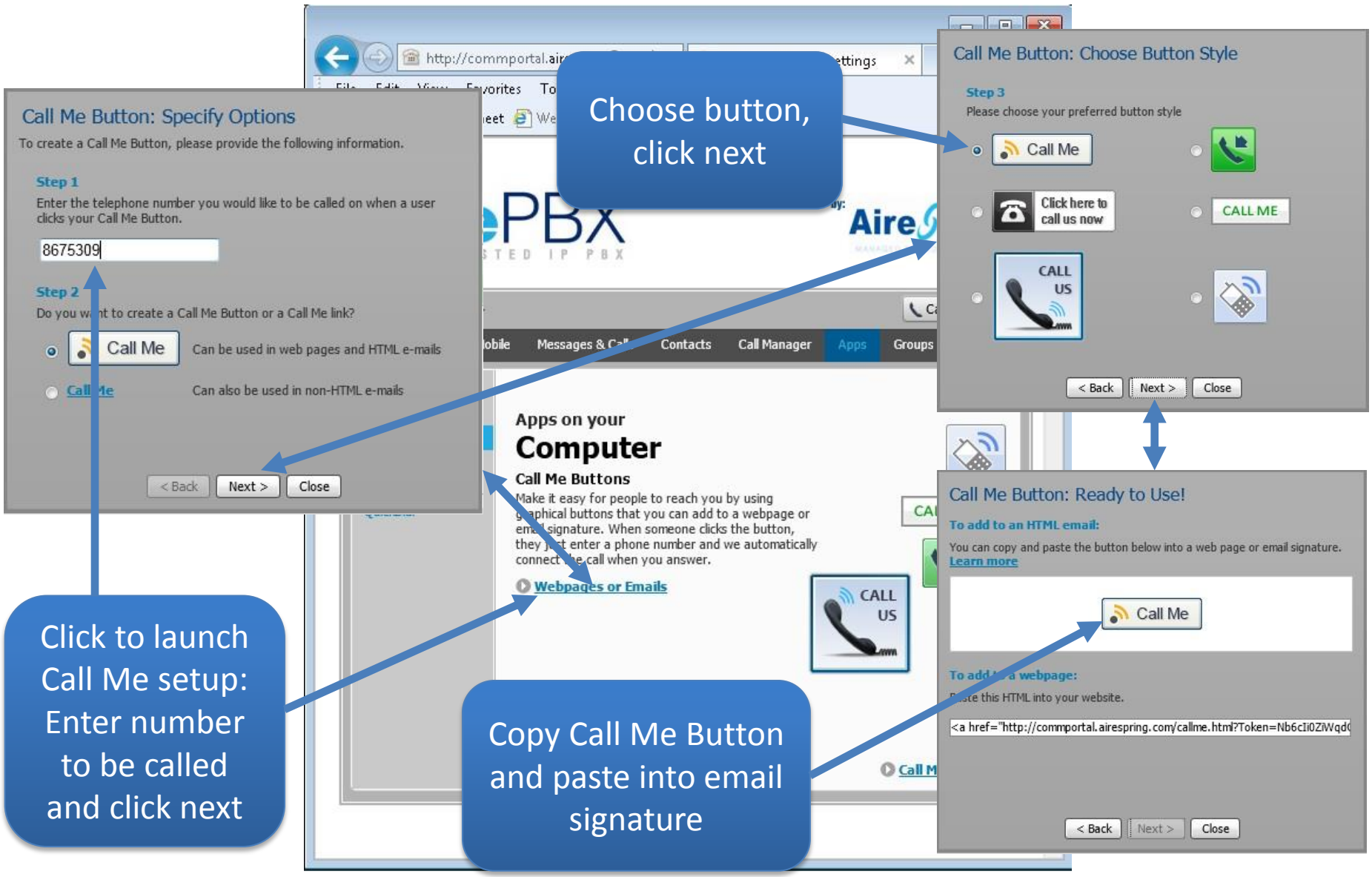
Widget will launch (Small view)

Click to expand to large view.



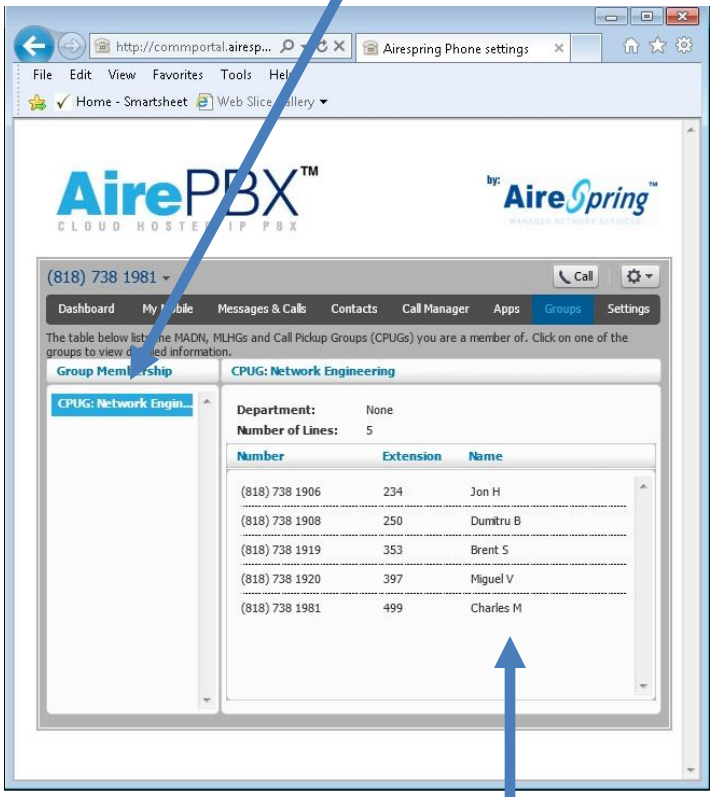
Note: follow same steps for other widgets

Call Me!


Call Me Button: Specify Options
To create a Call Me Button, please provide the following information.
Step 1
Enter the telephone number you would like to be called on when a user clicks your Call Me Button.
8675309
Step 2
Do you want to create a Call Me Button or a Call Me link?
Call Me
Can be used in web pages and HTML e-mails
Call Me
Can also be used in non-HTML e-mails
< Back
Next >
Close
Choose button, click next
Call Me Button: Choose Button Style
Step 3
Please choose your preferred button style
Call Me
Click here to call us now
CALL ME
CALL US
< Back
Next >
Close
Apps on your
Computer
Call Me Buttons
Make it easy for people to reach you by using graphical buttons that you can add to a webpage or email signature. When someone clicks the button, they just enter a phone number and we automatically connect the call when you answer.
Webpages or Emails
CALL US
Call Me Button: Ready to Use!
To add to an HTML email:
You can copy and paste the button below into a web page or email signature.
Learn more
Call Me
To add to a webpage:
Paste this HTML into your website.
<a href="http://commportal.airespring.com/callme.html?Token=Nb6cIi0ZiWqdC
< Back
Next >
Close
Click to launch Call Me setup: Enter number to be called and click next
Copy Call Me Button and paste into email signature

Groups

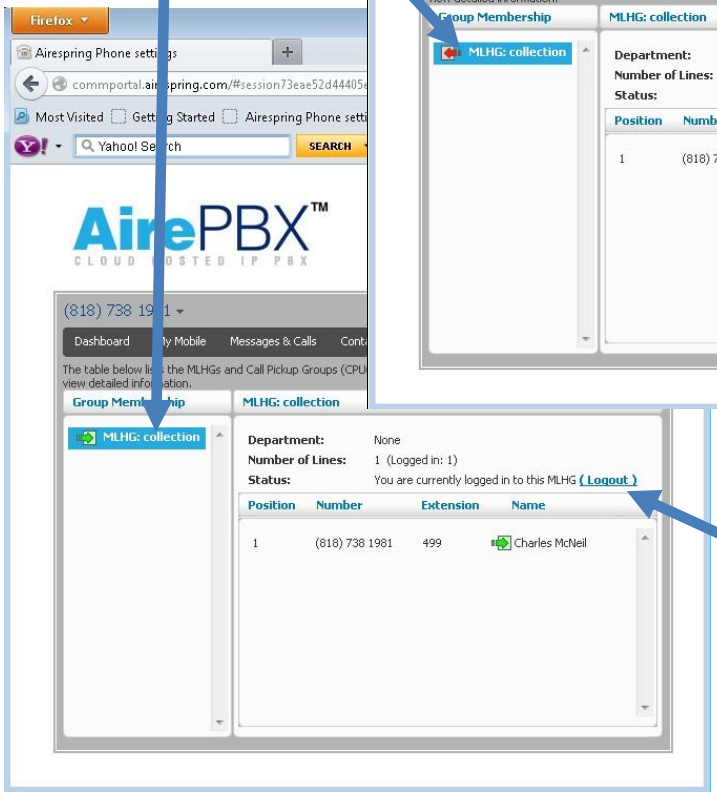
List of Multi Line Hunt Groups you are a member of

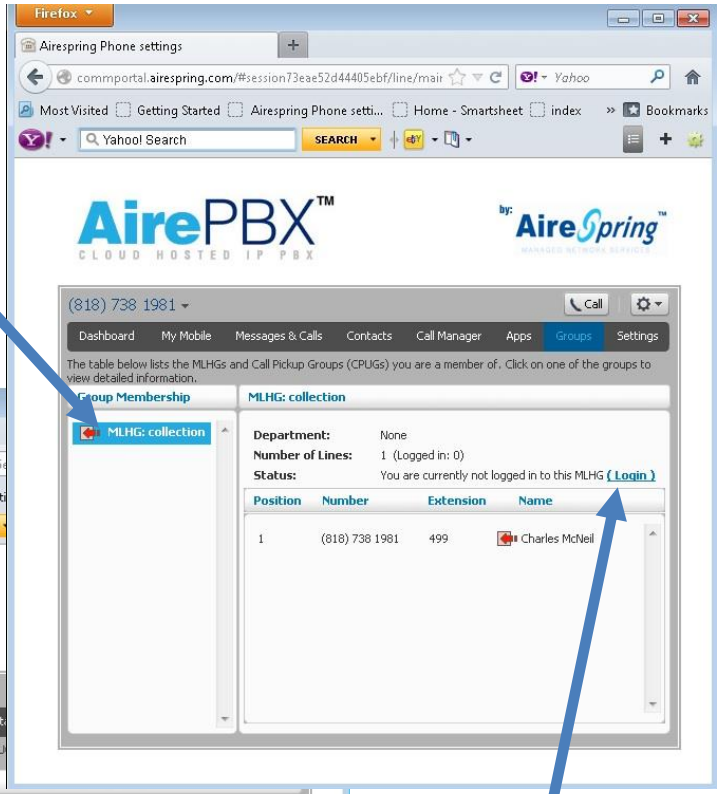


Other members of the MLHG

If Login is Activated

Logged In/Out Status



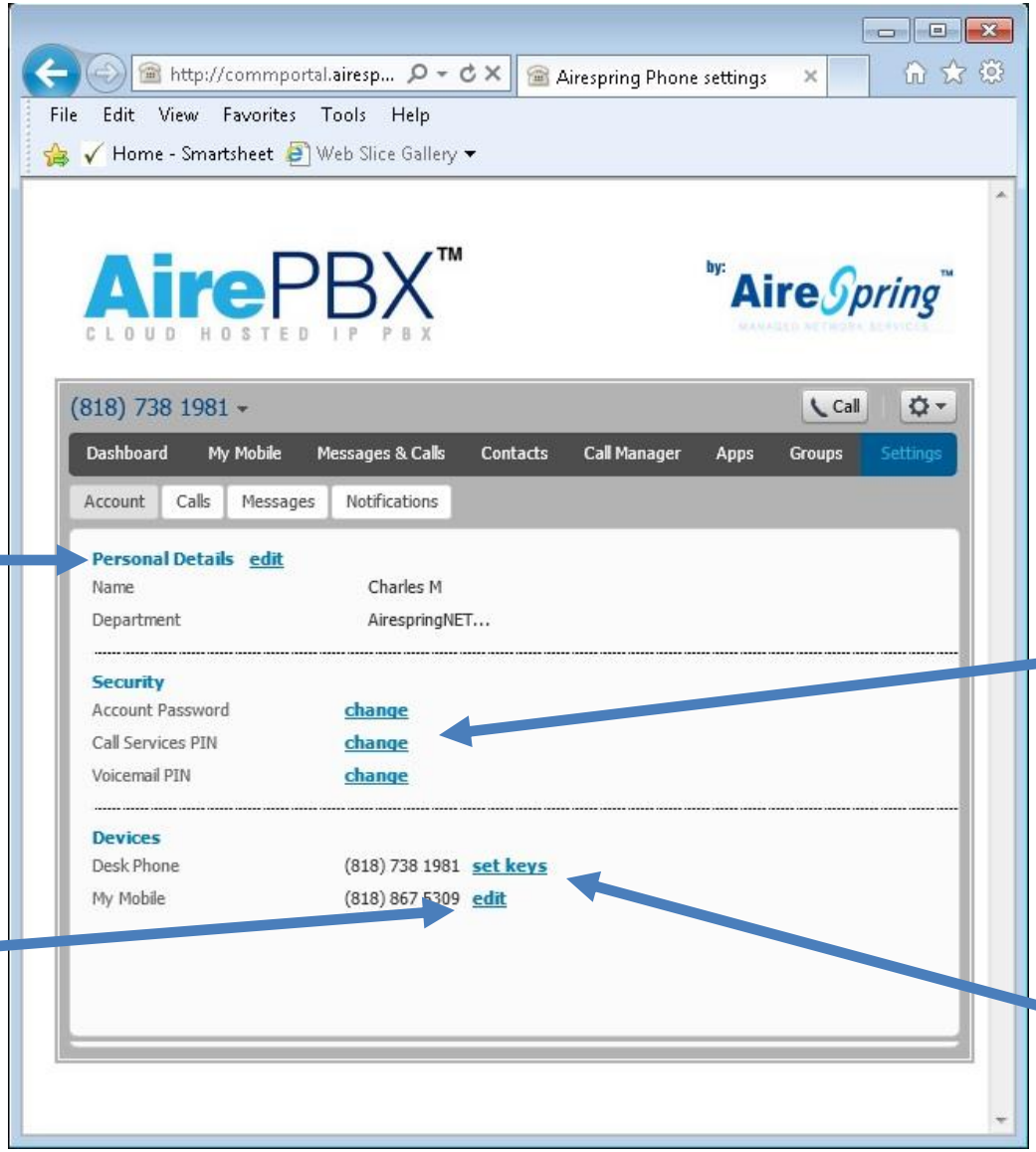


Click to Login Logout

Settings – Account

Personal Details can only be edited by BGAdmin

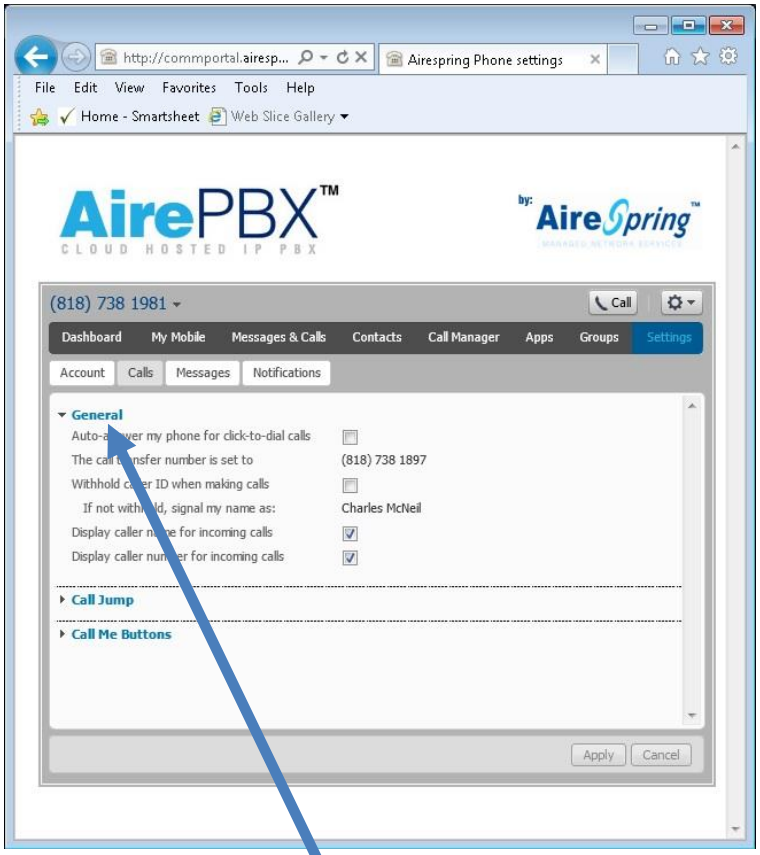
Shortcut to My Mobile Tab

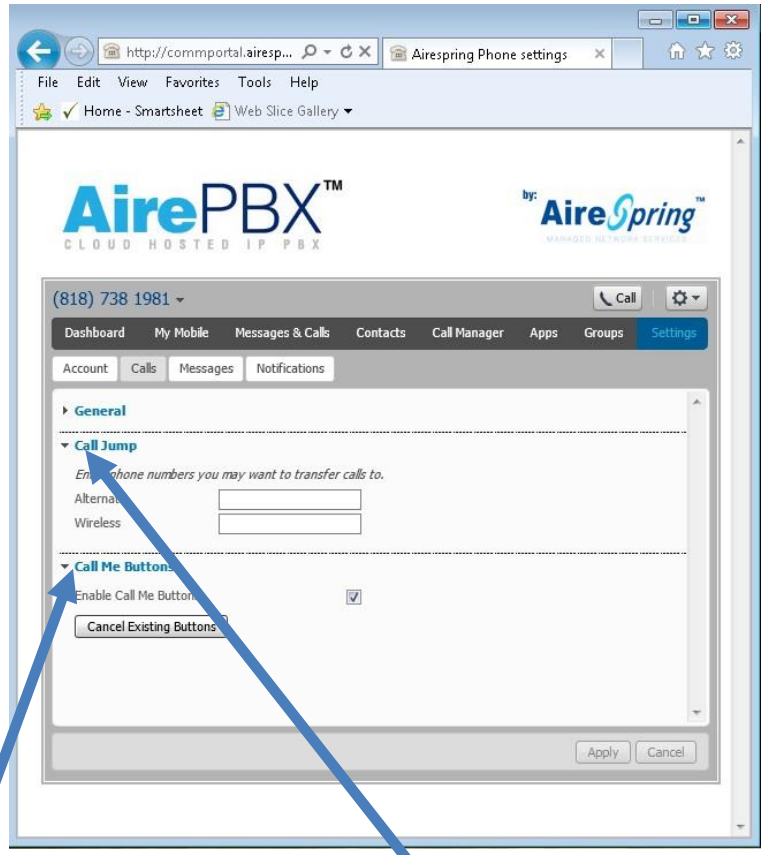


Security: Change Password and PINs

To access Phone key setup

Settings - Calls



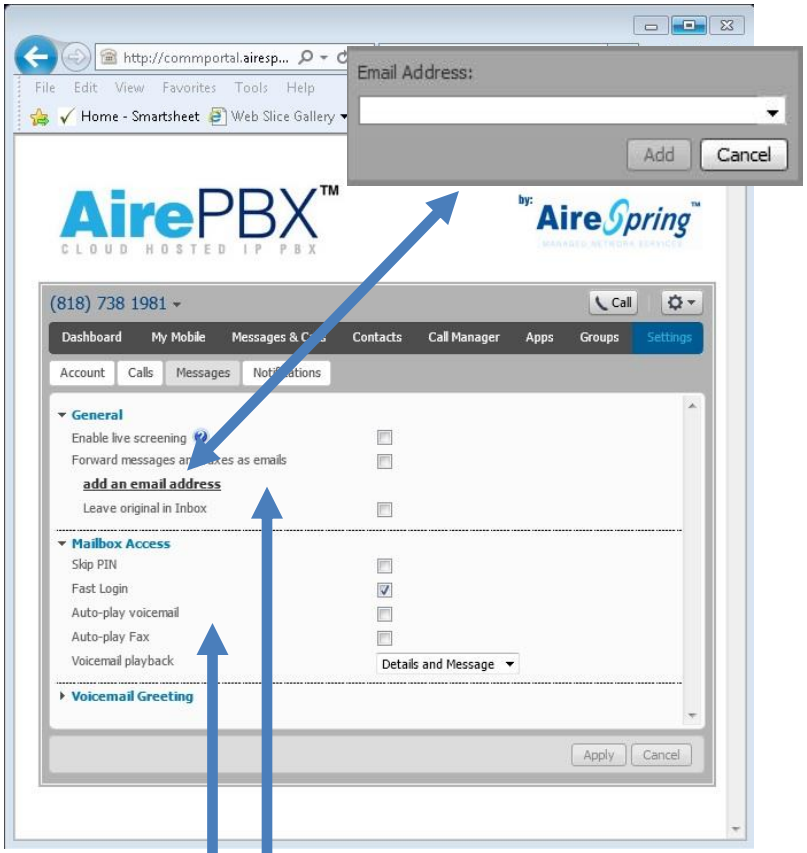


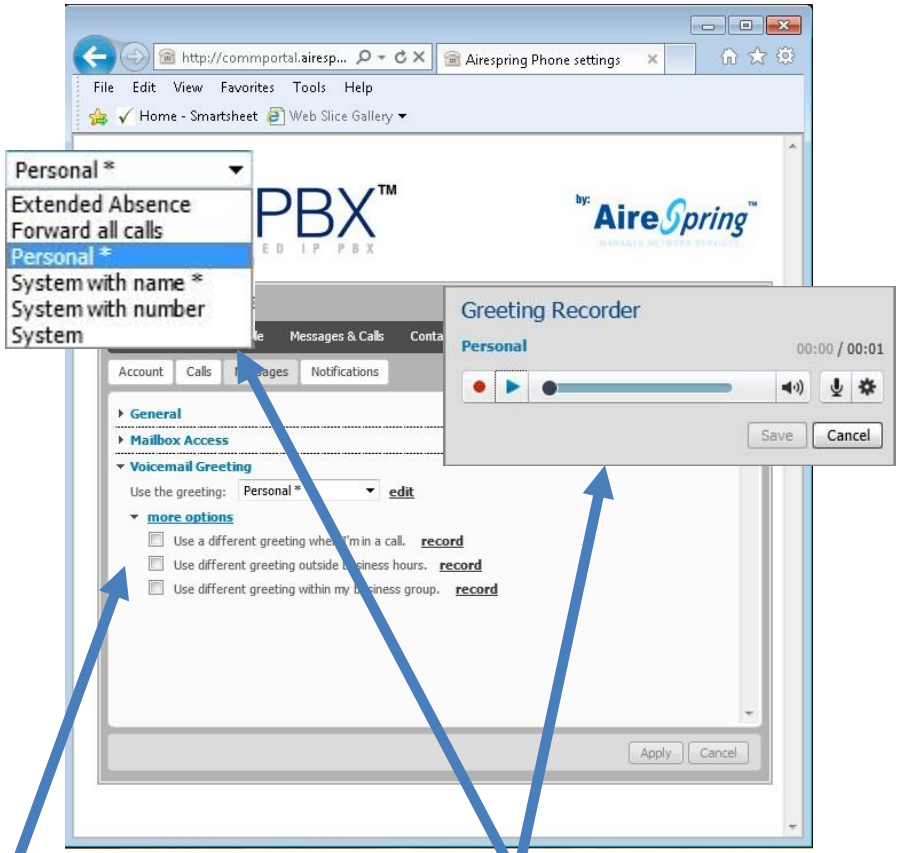
General Call setup options

Call Me Buttons Enable or Cancel Exiting

Call Jump Enter frequently used call jump numbers

Settings - Calls



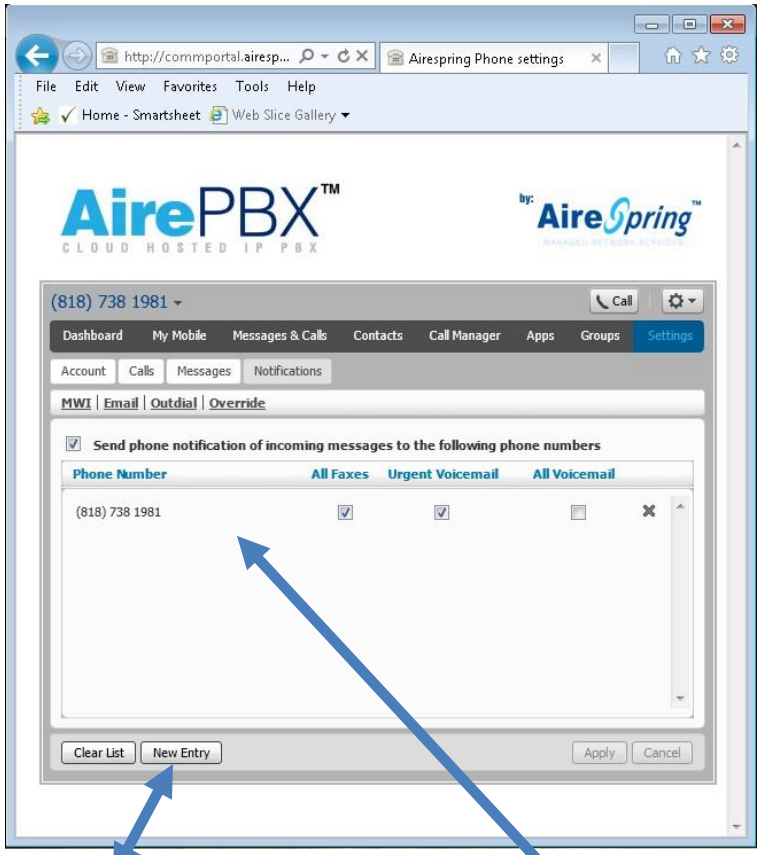


General and Mailbox Access setup Options

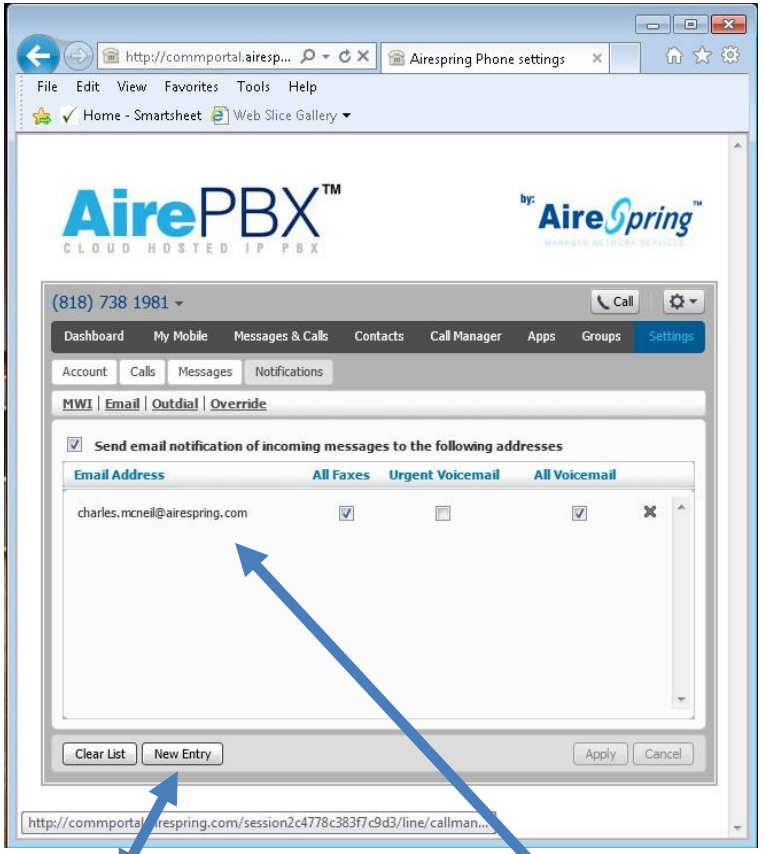
Voicemail Greetings and setup options

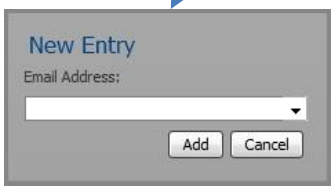
Pop Ups for greeting choices and to record personal greetings

Settings - Notifications



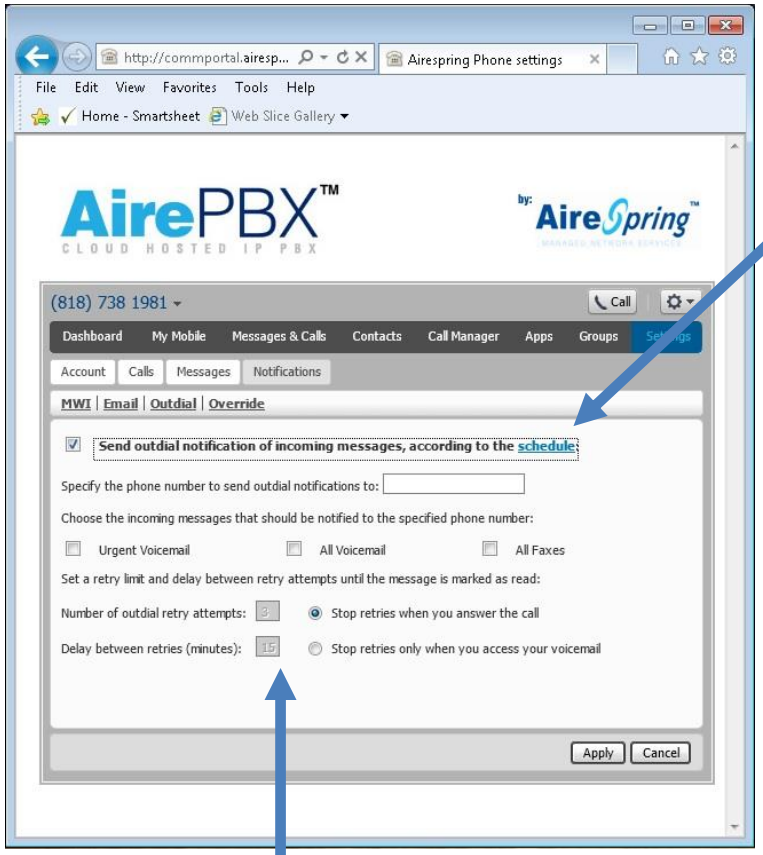
Message Waiting Indications
Send notifications of messages to a Phone

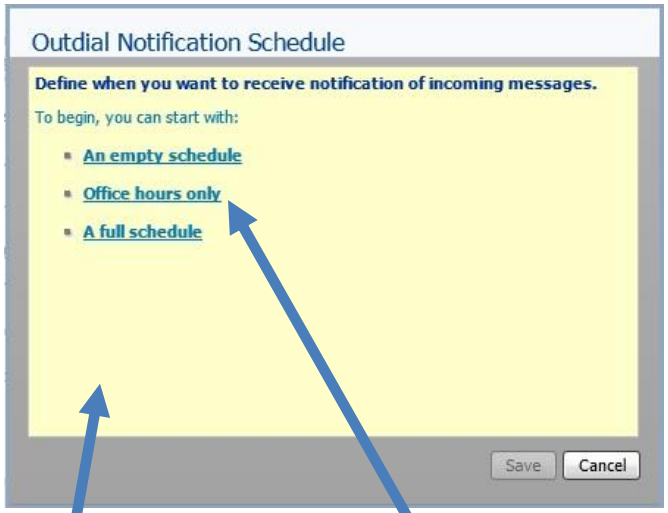


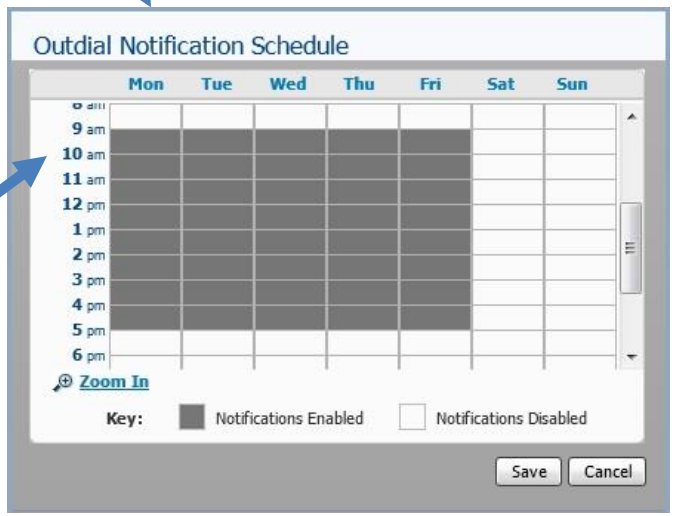


Send notifications of messages to a email

Settings - Notifications



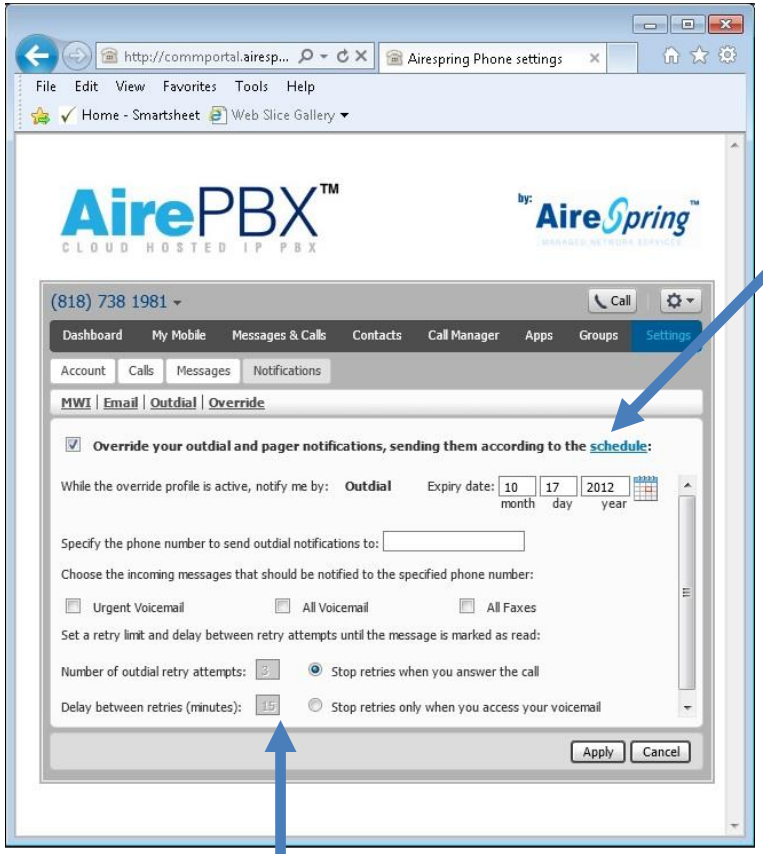


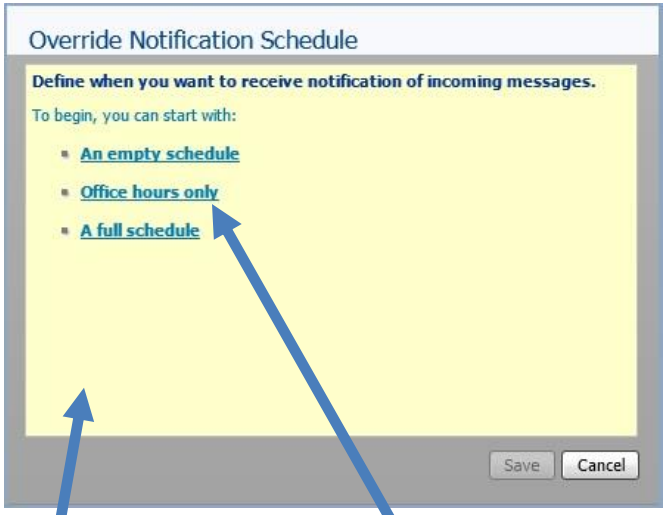


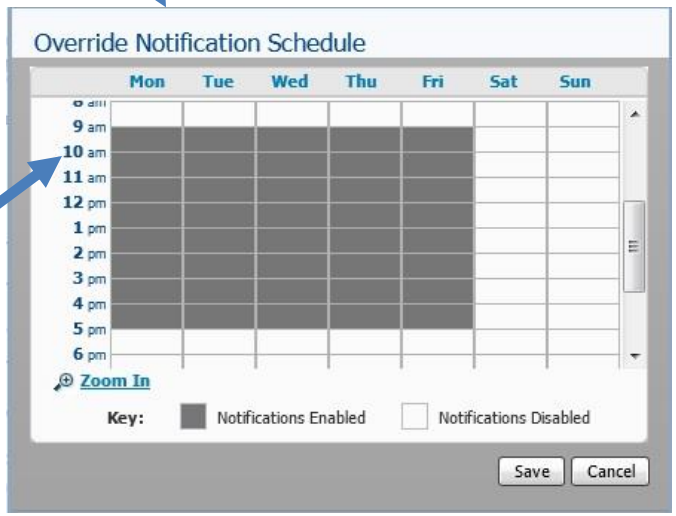
Outdial notification setup options

Pop Ups to create schedule for notifications

Settings - Notifications



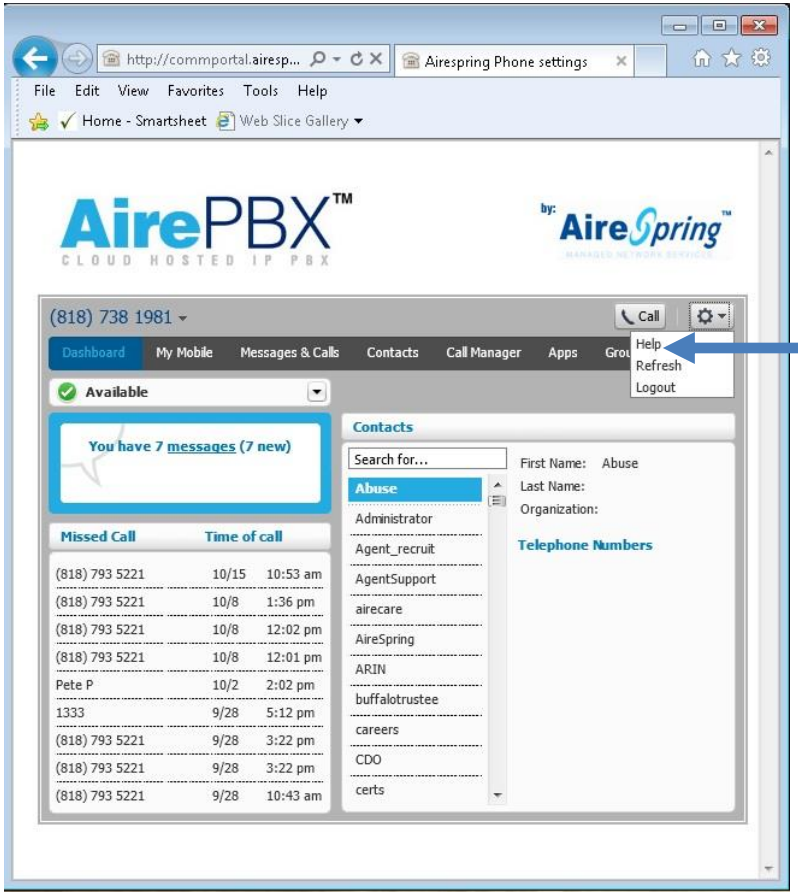




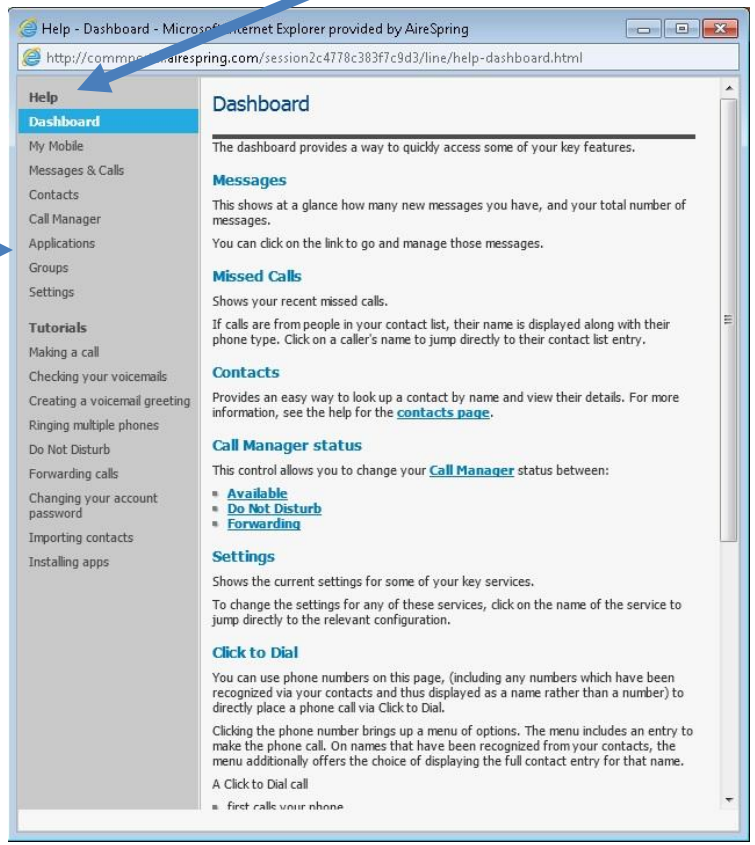
Override – Outdial and Pager notification setup options

Pop Ups to create override schedule of notifications

Additional HELP!



Onboard Help Pop Up



MetaSwitch YouTube Channel

www.youtube.com/user/builtonmetaswitch?feature=results_main