



access one  
Hosted PBX  
Quick Start Guide

# WELCOME

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Welcome to Access One Hosted PBX! 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 [www.accessoneinc.com](http://www.accessoneinc.com).

This guide covers the three main elements of the Hosted PBX product:

1. CommPortal - A web portal used for configuration and calling history
2. MaX UC Desktop - A Windows/Mac client for calling, instant messaging, and more
3. MaX UC Mobile - An app for iOS/Android that includes a full-featured dialer, instant messaging, and more

As always, you can also contact our local customer care team at 800.804.8333, and we will be happy to assist you.

## COMMPORTAL

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

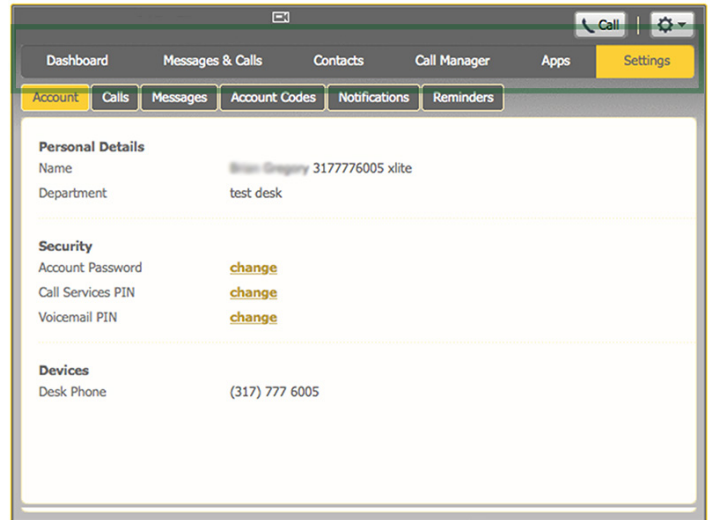
- View missed calls
- Listen to voicemail messages
- Manage your contacts
- Set up rules to route your calls
- Perform many other functions

To get started, go to the login page at: <http://commportal.accessoneinc.net/v2> . (Consult your administrator regarding your default password. Once you log in, you will be prompted to create a new password.)

**Note:** This guide is representative, and images may vary from your individual CommPortal screens.

## Getting Oriented

Once you are logged in, you will see the main CommPortal screen with the following menu options:



- Dashboard - Quick view of most common functions
- Messages and Calls - Access call history
- Contacts - Store and retrieve contact information
- Call Manager - Manage how your incoming calls are handled
- Apps - Adds applications to your service
- Settings - Change your call settings

## Dashboard

CommPortal Dashboard is the main screen for the portal. On it you can view a range of information including recent calls, messages, contacts, and customized settings.

## 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 subtabs to get more detail. 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, and you will have the option to save or delete either on the player screen or main screen.

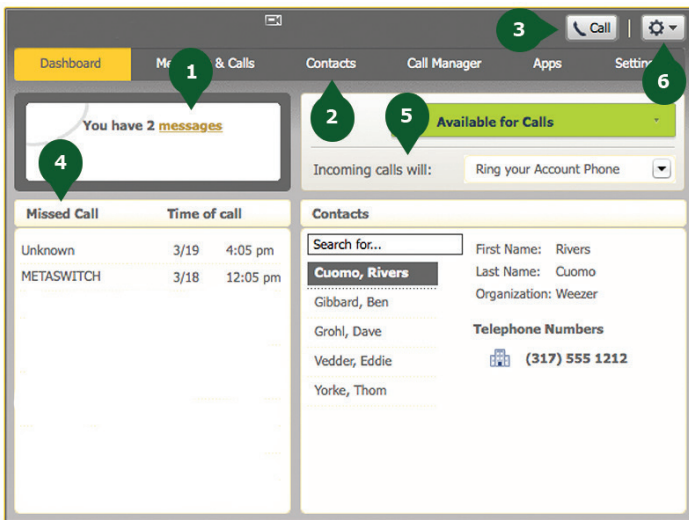
Click the New Voicemail button at the bottom of the page to record and leave a voicemail as a memo (your computer must have a microphone to use this function).

Click the icon at the end of the line to mark as Heard/New, Forward as Email, or Forward as Voicemail.

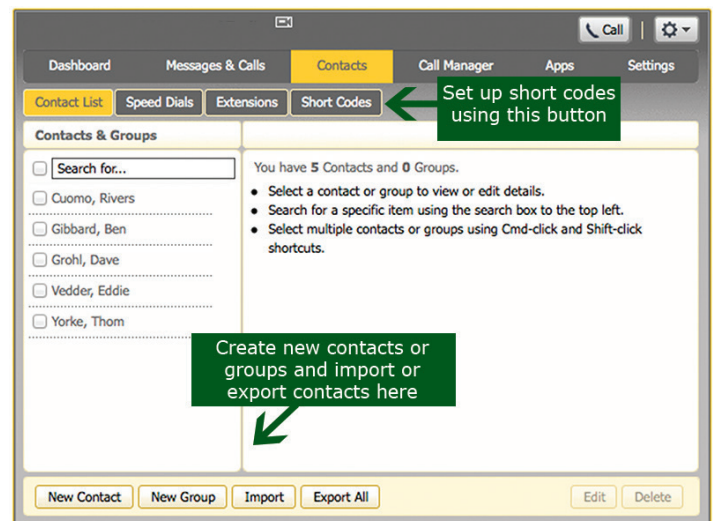
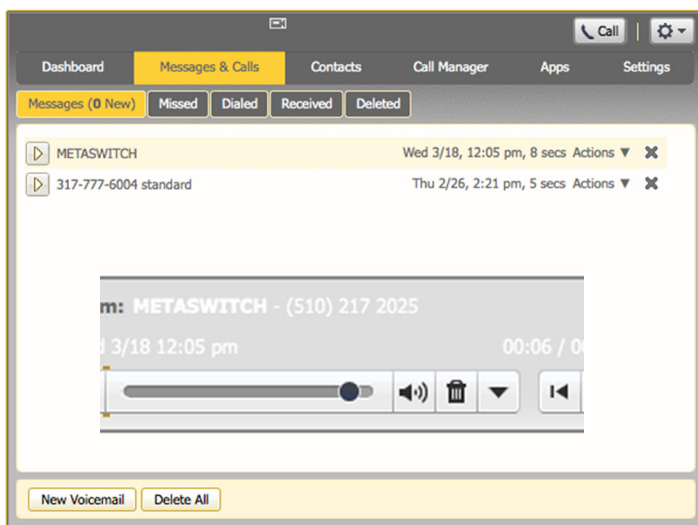
From the Missed, Dialed, and Received tabs you can click on the name and either call them, add them to your contacts, or jump to the caller's existing contact information.

## Contacts

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 call or by creating a new one from scratch), create groups of contacts, or import/export your contacts.



1. Voicemails - Click this area to view and retrieve voicemails
2. Contacts - Import your contacts from Outlook, or create new ones, then click on a name to dial
3. Call Button - Use to make new calls to numbers that may not be in your address book
4. Missed Calls - Click any missed call on the list to call the number back
5. Active Settings - For example, if you are forwarding your number, that information would appear here; click to adjust
6. Settings - Logout, refresh, or scroll to Help to view step-by-step tutorials describing how to perform tasks within a user's CommPortal

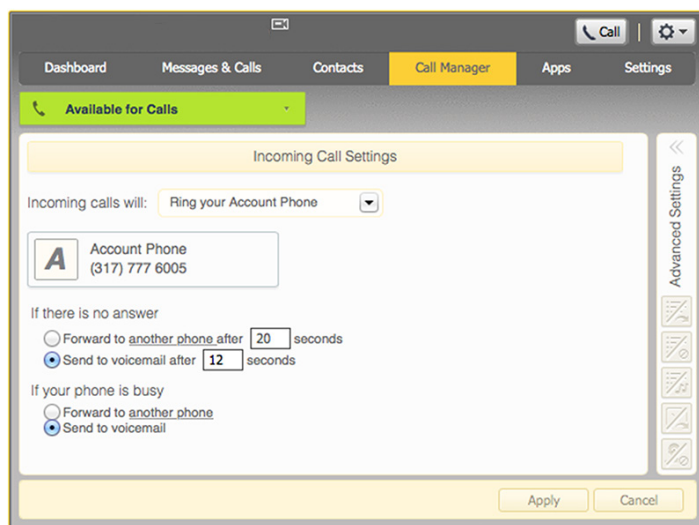


The fastest way to add your contacts is to import them from your email program. If you use Microsoft Outlook, follow these instructions:

- Open Outlook and go to the File tab, then Import and Export
- A new window should appear
- Select Export to File and 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, and then save in a place you can easily locate such as the Desktop or My Documents
- Go back to the CommPortal Contacts tab
- Click the Import button
- Click the Browse button to find the Outlook Contacts file
- Click Import
- Your contacts are now in CommPortal!

## Call Manager

The Call Manager tab enables you to manage how incoming calls are routed to you. The top section 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.

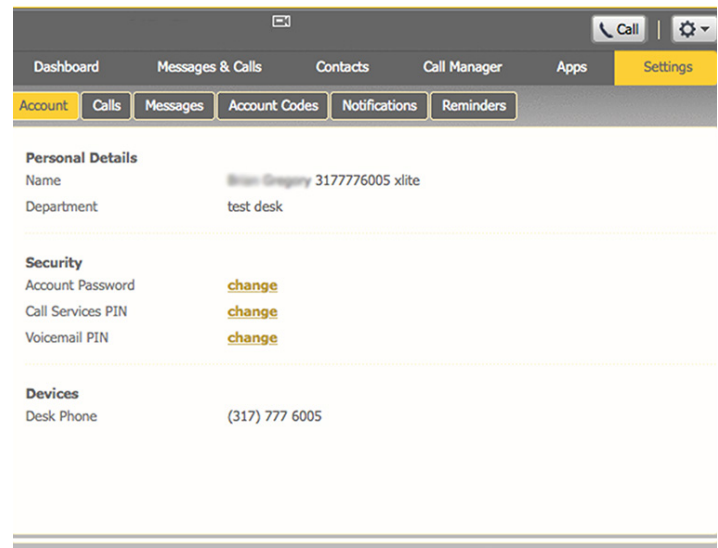


The screenshot shows the 'Call Manager' tab in the CommPortal interface. At the top, there is a navigation bar with 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', and 'Settings'. Below this, a green bar indicates the current status is 'Available for Calls'. The main content area is titled 'Incoming Call Settings' and includes a dropdown menu for 'Incoming calls will:' set to 'Ring your Account Phone'. Below this, the 'Account Phone' is listed as '(317) 777 6005'. There are two sections for handling calls: 'If there is no answer' and 'If your phone is busy'. In the 'no answer' section, 'Send to voicemail after 12 seconds' is selected. In the 'phone is busy' section, 'Send to voicemail' is selected. An 'Advanced Settings' sidebar is visible on the right, and 'Apply' and 'Cancel' buttons are at the bottom.

## Settings

To change your password and/or PIN, click on the security options on the Accounts tab. The Messaging tab enables you to receive notification of a voicemail as an email, manage mailbox settings, customize how you are notified of a voicemail, configure greetings, and more. From Greetings you can personalize your voicemail greeting by recording an announcement (a microphone is required).

Use the set keys link (shown below) to configure your phone according to your preferences. Once you configure your phone, you should not need to use this tab frequently.



The screenshot shows the 'Settings' tab in the CommPortal interface. The navigation bar includes 'Dashboard', 'Messages & Calls', 'Contacts', 'Call Manager', 'Apps', and 'Settings'. Below the navigation bar, there are tabs for 'Account', 'Calls', 'Messages', 'Account Codes', 'Notifications', and 'Reminders'. The main content area is titled 'Personal Details' and shows 'Name: Brian Gregory 3177776005 xlite' and 'Department: test desk'. Below this is the 'Security' section with links to 'change' for 'Account Password', 'Call Services PIN', and 'Voicemail PIN'. The 'Devices' section shows 'Desk Phone: (317) 777 6005'. A 'set keys' link is visible at the bottom of the page.

## MAX UC FOR DESKTOP

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Your Access One phone service can be used to make or receive calls from your desk phone, PC or Mac, and mobile devices.

For this service to work on your desktop, you will need to install the MaX UC software on your PC or Mac. The following information helps you to do that.

### Ensure Your Computer is Compatible

MaX UC for Desktop works on PCs running Windows 7 or Windows 8. It also runs on Macs with OS X 10.7 or later versions.

You can use your computer's built-in microphone and speakers with MaX UC, but you will have much better audio quality if you use a headset. MaX UC works with most common headsets, including Bluetooth. It will even work with the answer/reject call button on some headsets.

### Find Your Password

You'll need your Access One CommPortal phone number and password to start using MaX UC for Desktop. If you don't have this information, contact us at 800.804.8333.

### Download and Install the Software

Download and install MaX UC for Desktop: <http://commportal.accessoneinc.net/v2> . Click the Apps tab, select MaX UC, and choose your operating system to begin download.

When prompted, save the file. Then find it in your downloads folder and open it to begin the installation process.

### Exploring MaX UC

MaX UC for Desktop is like having your desk phone on your computer. You can make and receive calls, hold calls, transfer calls, and make three-way calls.

You can also use it to send instant messages to

other people in your corporate directory who are using MaX UC, no matter what device they are using.

MaX UC should be populated with your company contacts. In some cases you may need to search for your commonly used contacts by typing their name into the Enter Name or Number field.

Under the Tools menu, choose Options. Here you can see your configuration options for MaX UC, including synchronizing contacts and enabling interaction with a desk phone.

### Making Calls

Making a call is as easy as entering the number on the keypad or clicking on a contact's call button. If your contact has more than one number, you can choose which one to call from the drop-down list.

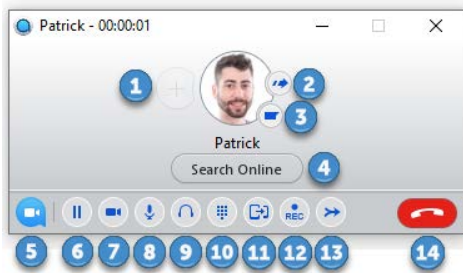
If the person you're calling has caller ID, they will see your individual business number.

### Receiving Calls

When someone calls your number, you'll see a pop-up box on your computer screen. You'll also hear a ringing tone through your speakers or headset. The pop-up shows the number of the person calling you. If that person's details are already in your contacts list, you'll also see the caller's name.

Depending on the suite of services you have, you may see the incoming call on your desk phone, mobile phone, or tablet device. You can answer the call on the device that is most convenient for you.

## During the Call



While a call is in progress you'll see the call window. Use this window to:

1. Add a participant.
2. Transfer the call.
3. Send a chat message to the caller.
4. Perform a CRM look-up.
5. Uplift the call to Meeting.
6. Put the call on hold.
7. Send video.
8. Mute your microphone.
9. Adjust the volume.
10. Access the keypad.
11. Switch to another call.
12. Record the call.
13. Merge calls.
14. End the call.

## Video Calling

If the person you're talking to is also using MaX UC on the same network, you can upgrade your call to video at any time. Click on the camera icon to send your video. The other person will receive a prompt inviting them to switch on video as well. Click on the camera icon any time to turn off your video feed.

## Send the Call to Someone Else

Use the transfer button to send any call to another number. A menu will pop up, allowing you to choose the number for any contact or to type in a completely new number.

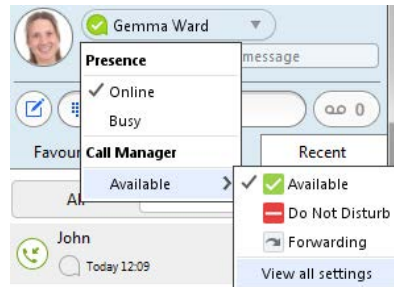
## Choosing Which Calls to Receive

Click on the status selector to reveal More Options at the end of the menu. This opens the Call Manager Status window. Here you can choose how calls are treated depending on who the call is from. You can also choose your preferences for how calls should be handled if they are from anonymous

numbers, VIPs, or numbers on your Unwanted Callers list.

## Available - Do Not Disturb - Forward Calls

You can tell MaX UC how to handle your incoming calls. Choose between:



- Online
- Busy
- Call Manager

Busy tells your contacts you are unavailable but will not block them from contacting you. Call Manager provides features for forwarding or do not disturb settings.

Note that when you change your status or set up a forwarding number, the change applies on every device on which you use MaX UC. If you step away from your computer and forget to change your status, you can easily do it from the app on your mobile phone (if installed).

## Your Contacts List

MaX UC for Desktop assembles a contact list for you to use. Depending on how your service is set up, this list may include:

- Contacts that you type directly into MaX UC for Desktop
- Contacts that are contained in the Outlook or Mac local address book that is stored locally on your computer
- Contacts that are in CommPortal contacts
- Contacts that are in your corporate directory

Use the Options menu to configure how you manage your contacts.

## MAX UC FOR MOBILE

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### Visual Voicemail

If you have a voice or video message, the indicator will change color and indicate the number of messages received.

Click on the Message button to see a list of the messages, to view transcriptions of the messages into text (where available), to listen to the messages, or to forward messages to another person.

### Emergency Calls

MaX UC enables you to make calls from anywhere on the most convenient device. If you place a 911 call from MaX UC, keep in mind the operator may not be able to identify where you are calling from.

### Favorites

For quick access to frequently-called people, add them to your Favorites list. Use the right-hand mouse button to click on any contact and choose Add to Favorites from the drop-down list. Favorites will appear in both the Favorites and Contacts lists.

MaX UC for Mobile is a full-featured soft phone for your mobile device or tablet. It enables you to send and receive calls from your business number, as well as instant message.

### Ensure Your Device is Compatible

MaX UC for Mobile works on:

- Android phones and tablets running 3.3.3 (Gingerbread) or later versions
- iPhone 3GS, 4, and 4S running iOS 5 or later
- iPads running iOS 5 or later

Video calling only works on devices that have a front-facing camera.

### Find Your Password

You'll need your Access One CommPortal phone number and password to start using MaX UC for Mobile. If you don't have this information, call us at 800.804.8333.

### Download and Install App

Search for 'MaX UC' in iTunes or the Google Play store and download the MaX UC Mobile app to your device. When you open the app, you'll be prompted to choose your provider. Scroll to 'Access One' and select. Next you will need to enter your username and password. Generally your username will be your 10-digit business phone number. If you've logged in to CommPortal before you likely will have changed your password. If you don't know your password, contact your administrator.

### Exploring MaX UC

MaX UC for Mobile is like having your desk phone on your mobile - and a whole lot more. You can make and receive calls, hold calls, transfer calls, and make three-way calls. You can use it to send instant messages to other people in your corporate directory who use MaX UC, no matter what device they're using. You can even push and pull calls over to your phone from other twinned devices, mid-call.

MaX UC for Mobile uses available Wi-Fi or mobile data services that are connected to your mobile phone, so you can make and receive calls without using your mobile phone minutes.

## Making Calls

To make a call, enter the number you are calling into the MaX UC dialer, or simply tap on the contact and touch the contact's number. MaX UC for Mobile will route the call over Wi-Fi or using 3G/4G/LTE mobile data. If the person you are calling has caller ID, they will see your individual Access One phone number.

## Receiving Calls

When someone calls your Access One number, the MaX UC app will offer you the choice to accept or reject the call.

Depending on the suite of services you have, you may see the incoming call on your desk phone, desktop, or tablet device. You can answer the call on whichever device is most convenient for you.

Calls directly to your mobile number utilize the device's native dialer as normal.

## During the Call

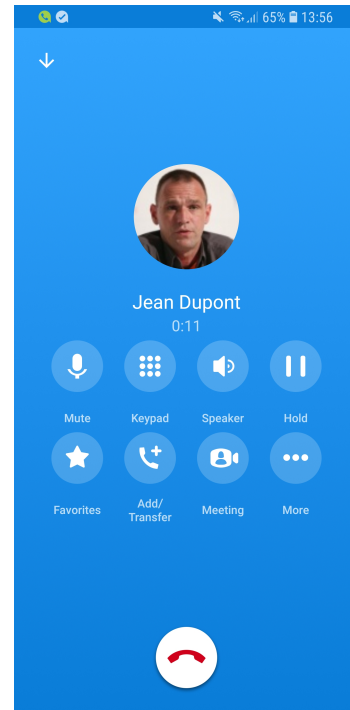
While a call is in progress, you will have these options:

- Mute the call
- Open dial pad
- Turn on speaker mode
- Switch
- End call

## When Another Call Comes In

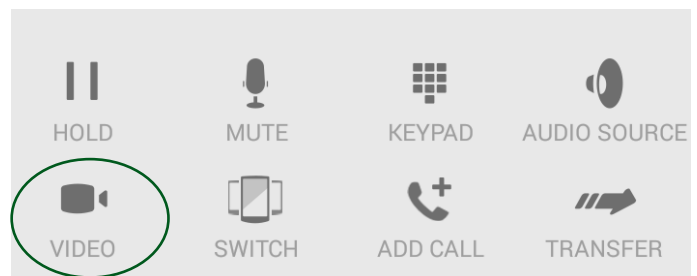
You may receive a call while you are already on a call. MaX UC for Mobile gives you the choice to:

- Hold the existing call and answer the new call
- End the existing call and answer the new call
- Ignore the new call



## Video Calling

If the person you're talking to is also using MaX UC, you can upgrade your call to video at any time. Click on the video call camera icon to send your video. The other person will receive a prompt inviting them to switch on video as well. Click on the camera icon at any time to turn off your video feed.

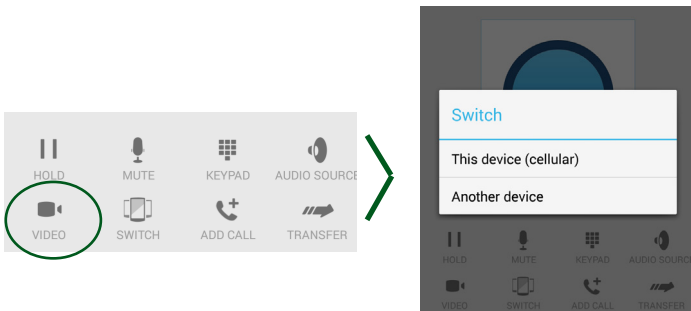


## Switch: Move an Active Call

A call on MaX UC will be on Wi-Fi or on a mobile data service. If the connection is not reliable, the audio may be of poor quality. If this happens, you can switch the call to a regular cell phone connection by pressing the switch button. You'll see the option to switch to This Device (cellular). Remember that the call will then start using your mobile minutes.



You may also choose to switch the call to another device running MaX UC, such as your desktop PC or your iPad. To make this switch, choose the option for Other Device, and then answer the call on whichever device is most convenient.

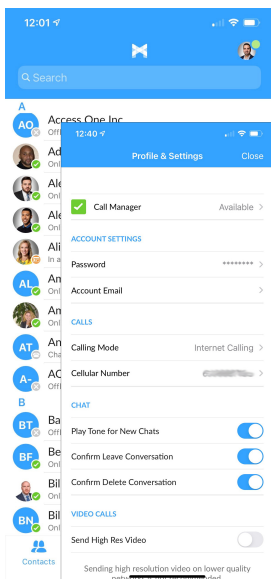


## Push and Pull Call from Another Twinned Device

You may have a call in progress on another device that is twinned to the same number, such as your desk phone, MaX UC desktop on a PC, or MaX UC Mobile on a tablet device. You can push and pull that call to another device running MaX UC.

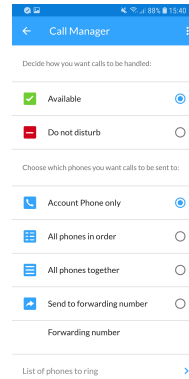
If a call exists that can be pulled, the MaX UC app on your mobile phone will notify you that there is a Call Available to Pull. If you want to move the call to your mobile phone, just follow the prompts to pull the call from your other device to your mobile phone. This also works if you want to pull the call to your tablet device.

## Choosing Which Calls You Receive



Touch the the circle icon in upper right corner (your set photo or initials) in the MaX UC contacts to reveal the other controls needed to access the many rich features of MaX UC for Mobile.

Call Manager lets you decide who can reach you and when. You can tell MaX UC how to handle your incoming calls:



If Do Not Disturb is selected, callers will hear a recorded voice announcement saying that you're unavailable and they will be connected to your voicemail. None of your devices will ring when Do Not Disturb is activated.

You can also tell MaX UC to Forward All Calls to another number. Click this option and you will be prompted to enter the number.

Note that when you change your availability status or set up a forwarding number, the change applies on all devices, including your desk phone. Therefore, if you temporarily misplace your mobile phone and forget to change your status, you can do it from the MaX UC for Desktop app on your PC, Mac, or iPad.

## Your Contacts List

MaX UC for Mobile opens automatically to your MaX UC contact list. Depending on how your service is set up this list may include:

- Contacts that are contained in the contacts list already on your phone
- Contacts that are in your corporate directory
- Contacts that are in CommPortal contacts

MaX UC for Mobile provides the user with access to the corporate directory and CommPortal contacts directly on the installed device.

When you are inside the MaX UC app and looking at the contacts page, you can press your phone's menu button or action bar to choose which of your contacts are presented to you when you are using MaX UC .

## Visual Voice Mail

Go to the Voicemails tab to see a list of messages received, see transcriptions of messages into text (where available), or listen to the messages.

## Emergency Calls

If you place a 911 call from MaX UC for Mobile, it will attempt to make the call using the native mobile phone dialer. 911 calls cannot be made from tablet devices at any time.

## Privacy and Protection

MaX UC for Mobile adds a new source of contacts that can be displayed, but it never changes any existing contacts.

If you add a contact directly into MaX UC for Mobile, it will open the usual contact management feature on your phone.

Contacts entered directly on your mobile device (not in MaX UC) and existing contacts entered directly into the MaX UC Mobile application are uploaded to your contacts on our servers.

## More Information

If you have additional questions about MaX UC for Mobile, call us at 800.804.8333 or email us at [support@accessoneinc.com](mailto:support@accessoneinc.com).



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