

WELCOME

Welcome to uControl Cloud 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 <http://clearrate.com/business/ucontrol-cloud-pbx/resources>.

As always, you can also contact our local customer care team at 877-877-4799 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:

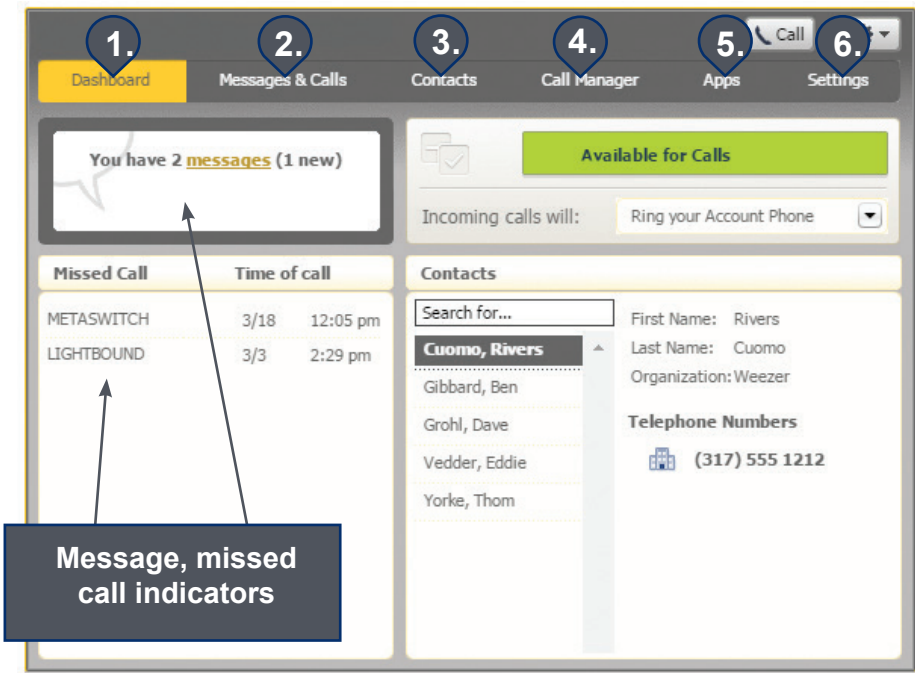
- View missed calls
- Listen to voicemail messages
- Manage your contacts
- Set up rules to route your calls
- Perform many other functions

To get started, go to the login page at: <https://ucontrol.clearrate.com>. (Consult your administrator regarding your default password. Once you log in, you will be prompted to create a new password.)

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

GETTING ORIENTED

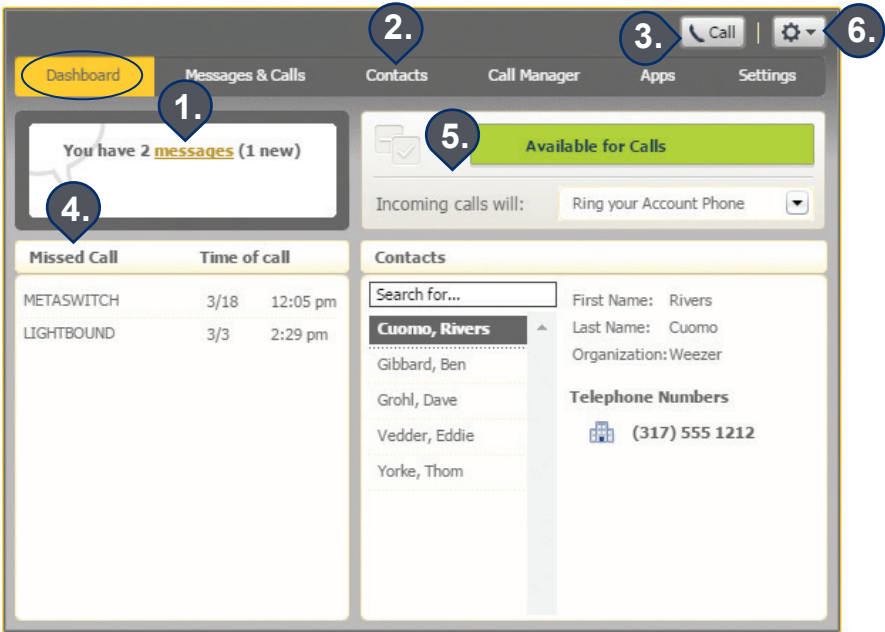
Once you are logged in, you will see the main CommPortal screen:



1. Dashboard – Quick view of most common functions
2. Messages and Calls – Access call history
3. Contacts – Store and retrieve contact information
4. Call Manager – Manage how your incoming calls are managed
5. Apps – Add applications to your service
6. Settings – Change your call settings

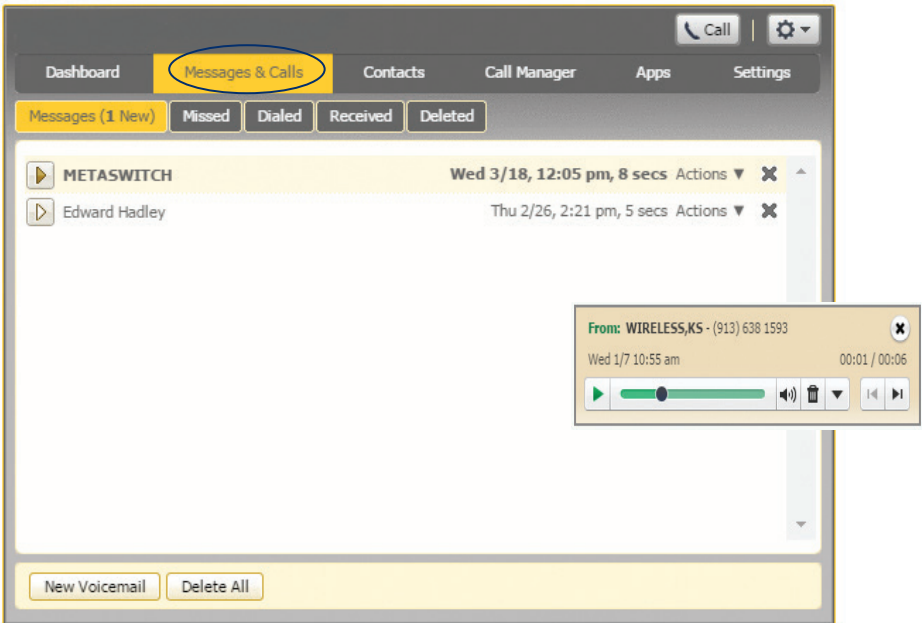
DASHBOARD

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.



1. Voicemails – Click this area 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. ‘Call’ Button – Use to make new calls to numbers that may not be in your address book
4. List of Missed Calls – Click any missed call to call the number back
5. Active Settings – For instance, if you are forwarding your number, that information would appear here – click to adjust
6. Settings – Logout, Refresh or scroll to Help where help pages are visible and step-by-step tutorials describe how to perform tasks within a user’s CommPortal

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. 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.

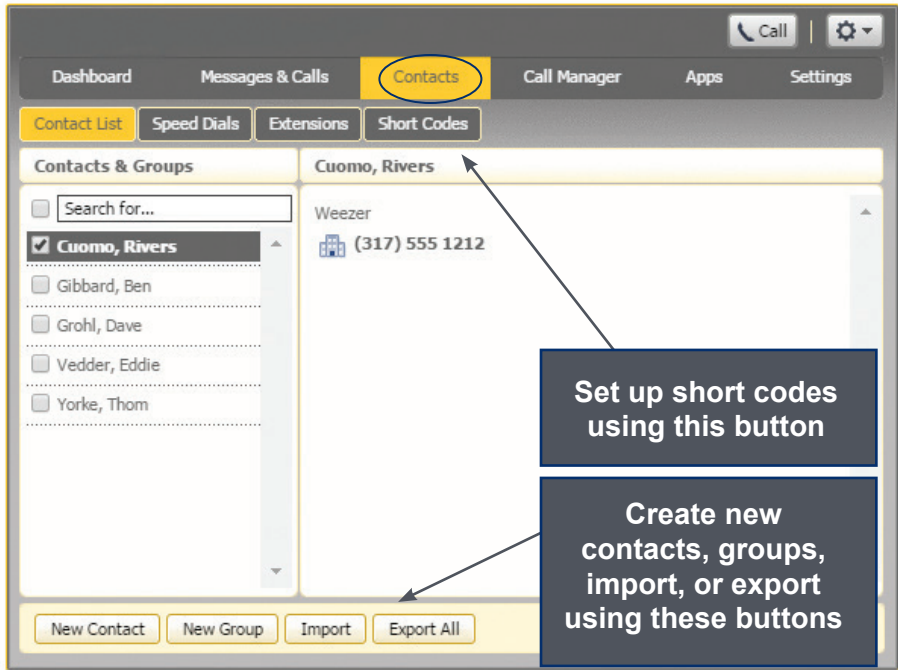
Click the ‘New Voicemail’ button at the bottom of the page to record and leave a voicemail as a memo (your computer must have a microphone to use this function).

Click the ▼ at the end of the line to mark as Heard (or) 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 create a new one from scratch), 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 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.

Call | Settings

DashboardMessages & CallsContactsCall ManagerAppsSettings

Available for Calls

Incoming Call Settings

Incoming calls will: Ring your Account Phone

A

Account Phone
(317) 777 6005

If there is no answer

☐

Forward to another phone after 20 seconds

☒

Send to voicemail after 12 seconds

If your phone is busy

☐

Forward to another phone

☒

Send to voicemail

ApplyCancel

Advanced Settings

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.

Call | Settings

DashboardMessages & CallsContactsCall ManagerAppsSettings

AccountCallsMessagesAccount CodesNotificationsReminders

Personal Details

NameAaron Branham

Security

Account Passwordchange

Call Services PINchange

Voicemail PINchange

Devices

Desk Phone(317) 832 1002set keys



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uControl CommPortal
Quick Start Guide



877-877-4799

clearrate.com

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