

End-User Portal Quick Reference Guide



Logging Into the Portal

Your service provider will need to provide a few fundamental pieces of information to enable access to the Portal.

- The URL for the End-User Portal. This URL is specific to your organization.
- Your user name and password

Enter your user name and password in the login screen and click Sign In. The page will likely look different than the example shown below as the End-User Portal will be branded with your service provider's or your organization's colors and logos.

**Enter Username
& Password**

Click Sign-In

End-User Portal Login Page

Call Logs and Voicemail Messages

Manage call logs and access voicemail messages. Voicemail messages can be played from this tab; both call logs and messages can be selected and deleted.

The Event column shows the type of event such as incoming, outgoing, missed calls and voicemails

The Contact/Number column displays the name or the phone number associated with the event

The Status column displays voicemail state (read or unread)

Confirmation assures that your action was intentional.

AVRUM GROUP Welcome Renard Milen

Account

Call Logs
Calls and Messages

Address Book
Contacts

Routing
Rules

Settings
Services

CALLS AND MESSAGES

	Event	Time	Duration	Contact / Number	Status	
<input type="checkbox"/>	Voicemail	Jun 8, 2015 5:35:29 PM	00:00:08	Robert Lavi	Unread	▶
<input type="checkbox"/>	Missed	Jun 8, 2015 5:35:04 PM	00:00:00	Robert Lavi		
<input type="checkbox"/>	Outgoing	Jun 8, 2015 5:33:45 PM	00:00:19	Mary Sinclair		
<input type="checkbox"/>	Outgoing	Jun 8, 2015 5:33:24 PM	00:00:07	8025551212		
<input type="checkbox"/>	Incoming	Jun 8, 2015 5:31:18 PM	00:01:16	Mary Sinclair		
<input checked="" type="checkbox"/>	Voicemail	Jun 8, 2015 5:29:40 PM	00:00:15	Chi Hung	Read	▶
<input type="checkbox"/>	Missed	Jun 8, 2015 5:29:12 PM	00:00:00	Chi Hung		
<input type="checkbox"/>	Incoming	Jun 8, 2015 5:27:21 PM	00:00:29	Chi Hung		

The Time column displays the date and time an event occurred

The Duration columns displays the length of the event

One-click to listen to voicemail messages

Message playback controls

Actions

Are you certain you wish to remove these entries?

YES

NO

Message

▶ 0:13 🔊

End-User Portal Call Logs Page

Address Book - Contacts

Add, manage, or edit your personal address book contacts. Create custom groups to organize your contacts into logical entities. Often custom groups are used to organize users by site or department. The entries and edits made here become visible in the clients for iOS, Android, PC, Mac, and the web.

There are two aspects to the address books, your personal address book and a company address book. Your company address book consists of all of the users in your organization, as well as any additional entries created by your company's system administrator. Your personal address book is completely under your control; simply add entries from the corporate address book and then edit and organize as you see fit. You can also create new entries for frequent contacts that are external to your organization.

Sort contacts by name, SIP address, or by group

Click First Name to edit that contact's information

Easily export contact lists to a .csv file

Search the address book for a specific contact

View/search the company directory

Manage personal groups

Edit the personal information that shows up in the directory

Add a new personal contact

Import contacts from a .csv file

Enable the check box next to Contacts - Select Remove Contact to delete

The screenshot shows the 'AVRUM GROUP' interface. At the top, there's a green header with 'AVRUM GROUP' and a user welcome message 'Welcome Renard Milen'. Below this is a navigation bar with icons for 'Call Logs', 'Address Book', 'Routing Rules', and 'Settings'. The 'Address Book' section is active, showing a 'CONTACTS' table. The table has columns for 'First Name', 'Last Name', 'SIP Address', and 'Group'. There are six contacts listed, each with a checkbox in the first name column. The contact 'Robert' is selected. To the right of the table is an 'Actions' sidebar with buttons for 'VIEW COMPANY LIST', 'MANAGE GROUPS', 'MANAGE SELF', 'ADD CONTACT', 'IMPORT CONTACTS', and 'REMOVE CONTACT'. A search bar is located above the table. Red lines connect various annotations to specific elements in the interface.

	First Name	Last Name	SIP Address	Group
<input type="checkbox"/>	Chi	Hung	chihung@experius.com	avrum marketing
<input type="checkbox"/>	Mary	Sinclair	marysinclair@experius.com	avrum operations
<input type="checkbox"/>	Milana	Božena	milanabožena@experius.com	
<input type="checkbox"/>	Renard	Milen	renardmilen@experius.com	
<input checked="" type="checkbox"/>	Robert	Lavi	robertlavi@experius.com	
<input type="checkbox"/>	Sashi	Shivali	sashishivali@experius.com	

End-User Portal Contacts Page

Address Book - Company List

Search for users within your organization or for entries added by your administrator. Users can add contacts from the Company Address Book List into their Personal Address Book List and then organize into Groups - making it easy to connect with the people you contact the most.

End-User Portal Company List

AVRUM GROUP Welcome Renard Milen

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Calls and Messages

[Address Book](#)
Contacts

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Rules

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Services

CONTACTS

	First Name	Last Name	SIP Address
<input checked="" type="checkbox"/>	Milana	Božena	milanabozena@experius.com
<input type="checkbox"/>	Renard	Milen	renardmilen@experius.com

Actions

[VIEW PERSONAL LIST](#)

Copy users to your personal list by selecting one of the options below.

[COPY TO LIST](#)

[COPY TO GROUP](#)

- avrum execs
- avrum marketing
- avrum operations

To Search, enter all or part of the contact's name and press the enter/return key

Enable the check box next to the contact(s) that will be added to your personal address book list or group

To copy a contact to your personal address book click Copy to List

To copy a contact to a group click Copy to Group and choose the desired group from the dropdown list

Address Book - Manage Groups

Create groups to make it easy to connect with the people you contact the most.

End-User Portal Manage Groups Page

AVRUM GROUP

Welcome Renard Milen

Account

Call Logs

Address Book

Routing Rules

Settings Services

GROUPS

Name

Members

avrum support

Group Name.

0

avrum execs

1

avrum marketing

1

avrum operations

Actions

VIEW COMPANY LIST

VIEW PERSONAL LIST

ADD GROUP

Click on the edit icon to edit.

Active Available

Directory

Add Contact

Import Contacts

Edit Group

Group:avrum marketing

Personal Address Book

Global Address Book

Personal Contacts

Group:<none>

Group:avrum execs

Group:avrum marketing

Group:avrum operations

Here is an examples of how groups are displayed in the PC Client. Groups help you logically organize a large personal address book.

CONTACTS

Name

Božena

Nickname

milanabozena@experius.com

SIP Address

milanabozena@experius.com

Business Phone

(555) 555-1212

Mobile Phone

(555)123-4567

Home Phone

E-mail

milana.bizena@avrumgroup.com

Group

Select

avrum execs

avrum marketing

avrum operations

Assigned group.

Assign contacts to a group from the Contact Add or Edit pages

Click the Add Group button to create a new group entry. Enter the name of the group and select the check box to submit.

Contacts can now be added to the new group.

Address Book - Add and Edit Contact

Easily add external contacts to your Personal Contact List. An Add Contact page will be displayed allowing you to enter the new contact's information.

AVRUM GROUP Welcome Renard Milen

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CONTACTS

Name First
Last

Nickname

SIP Address

Business Phone

Mobile Phone

Home Phone

E-mail

Group Select

Actions

SAVE CONTACT

RETURN TO LIST

End-User Portal Add Contact Page

After adding or editing a contact select the **Save Contact** button to confirm your changes

AVRUM GROUP Welcome Renard Milen

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CONTACTS

Name Milana
Božena

Nickname milanabozena@experius.com

SIP Address milanabozena@experius.com

Business Phone (555) 555-1212

Mobile Phone (555)123-4567

Home Phone

E-mail milana.bizena@avrumgroup.com

Group ☒ Select
avrum execs
avrum marketing
avrum operations

Assigned group.

Actions

SAVE CONTACT

RETURN TO LIST

End-User Portal Edit Contact Page

Address Book - Manage Self

Update the personal information others will see about you in the Corporate Address Book. You can also add/remove a profile picture.

After editing your information
select Save Contact

End-User Portal Manage Self Page

The image displays three overlapping screenshots of the AVRUM GROUP End-User Portal Manage Self Page, illustrating the steps to update contact information and add a profile picture.

Top Screenshot: Shows the 'CONTACTS' section with a form for updating contact information. The form includes fields for Name (Renard Milen), Nickname (renardmilen@experius.com), Business Phone, Mobile Phone (802-555-), Home Phone, and E-mail (renard.milen@avrumgroup.com). The 'Actions' menu on the right includes 'SAVE CONTACT', 'ADD PICTURE', and 'RETURN TO LIST'. A red box highlights the contact information form.

Middle Screenshot: Shows a 'File Upload' dialog box with the text 'Select the file to upload and then press upload or cancel.' The dialog has 'SELECT', 'UPLOAD', and 'CANCEL' buttons. A red dot marks the 'ADD PICTURE' button in the 'Actions' menu, with a red line connecting it to the dialog box.

Bottom Screenshot: Shows the 'CONTACTS' section after the profile picture has been added. The contact information form is visible, and a profile picture of a man is displayed next to the contact details. The 'Actions' menu now includes 'SAVE CONTACT', 'REMOVE PICTURE', and 'RETURN TO LIST'. A red line connects the 'REMOVE PICTURE' button to the profile picture.

Text Annotations:

- Update the contact information that others will see when they search the company directory** (points to the contact information form in the top screenshot).
- To add a profile picture:**
 1. Select Add Picture (Provide a picture that is 25kb or less and no greater than 160x120px)
 2. Select Upload
 3. Select Save Contact

Address Book - Import Contacts

Easily upload bulk contacts into your Personal Address Book.

AVRUM GROUP

Welcome Renard Milen

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Contact updated

CONTACTS

First Name	Last Name	SIP Address	Group
<input type="checkbox"/> Chi	Hung	chihung@experius.com	avrum marketing
<input type="checkbox"/> Mary	Sinclair	marysinclair@experius.com	avrum operations
<input type="checkbox"/> Milana	Božena	milanabozena@experius.com	

Actions

VIEW COMPANY LIST

MANAGE GROUPS

MANAGE SELF

ADD CONTACT

IMPORT CONTACTS

File Upload

Select the file to upload and then press upload or cancel.

SELECT

UPLOAD

CANCEL

AVRUM GROUP

Welcome Renard Milen

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Contact updated

CONTACTS

First Name	Last Name	SIP Address	Group
<input type="checkbox"/> Chi	Hung	chihung@experius.com	avrum marketing
<input type="checkbox"/> Mary	Sinclair	marysinclair@experius.com	avrum operations
<input type="checkbox"/> Milana	Božena	milanabozena@experius.com	
<input type="checkbox"/> Renard	Milen	renardmilen@experius.com	
<input type="checkbox"/> Robert	Lavi	robertlavi@experius.com	
<input type="checkbox"/> Sashi	Shivali	sashishivali@experius.com	

Actions

VIEW COMPANY LIST

MANAGE GROUPS

MANAGE SELF

ADD CONTACT

IMPORT CONTACTS

Select Import Contacts

Select a file to upload

Click Upload to upload your con-
tacts

End-User Portal Import Contacts Action

Routing - Rules

Create call routing rules to improve how calls are routed and managed; redirect calls based on simple filtering parameters. It's easy to ring multiple devices to increase your access to callers or conversely screen calls or send all calls to voicemail to preserve privacy.

End-User Portal Routing Page

Call Screening enhances privacy including the option to reject all anonymous calls or to send all calls directly to voicemail

Active	Scope	Action
<input type="checkbox"/>	All	Voicemail
<input checked="" type="checkbox"/>	Anonymous	Reject

CALL REDIRECTION Mode: Disabled Simultaneous Sequential Presence Based

SAVE ROUTING RULES

Call Redirection enables you to redirect inbound calls to multiple devices and phone numbers

CALL REDIRECTION

Mode: Simultaneous

Number of Rings: 3

Overflow to Voicemail: Disabled

SIMULTANEOUS

Number: renardmilen@experius.com 8025551212

Simultaneous Mode

Simultaneous Mode enables you to add phone numbers (such as a mobile number or home number) that all ring at the same time (in parallel) if someone calls your office number.

You can define how many rings the caller hears before the call is transferred to your voicemail. (if voicemail is disabled the caller will hear a disconnect tone).

CALL REDIRECTION

Mode: Sequential

Overflow to Voicemail: Enabled

SEQUENTIAL

Number: renardmilen@experius.com 8025551212

Sequential Mode

Sequential Mode enables you to add phone numbers (such as a mobile number or home number) that ring after your office number is unanswered.

You can define a string of numbers that ring in sequence in an attempt to locate you. If no one answers, the call will be transferred to your voicemail (if voicemail is disabled the caller will hear a disconnect tone). Users should be attentive to the total number of rings they define as an extended period of ringing may not be acceptable to callers.

CALL REDIRECTION

Mode: Presence Based

Number of Rings: 3

Overflow to Voicemail: Enabled

PRESENCE BASED

Number: 8025551212

Redirect If: ☐ Active On the Phone ☐ Unavailable Busy ☒ Unavailable Offline ☐ Unavailable On Vacation

Presence Based Mode

This mode uses your Presence status to determine if a call should be redirected to another number. For example, if you are offline and someone calls your office, you can forward those calls to your mobile phone.

You can define the Number of Rings, the forwarding number and the Presence status that triggers call redirection.

Settings - Services

Adjust personal account settings such as voice features, voicemail, and conferencing.

The Call Grabber features enables users to seamlessly switch live calls between devices or clients. You can also program an external number, like a mobile phone, to be authorized to grab a call. A Call Grabber access number will be provided by your system administrator. will recognize your Caller ID (matching the number entered) and automatically deliver the call to that line.

End-User Portal Settings Page

Set local
timezone

Enabling ID
Restriction hides
your CallerID
information

Assign PIN for using
vertical service code
features

Enable/Disable
Call Return (often
referred to as *69,
1471 or *10) to
allow/disallow access
to the last incoming
call on your line

Enable Auto
Retrieve to assure
that any call that
you park rings back
to your line if it is
unanswered

Enable/Disable
these parameters
to affect how
your presence
information is
presented to other
users

This information is for use with
the Call Grabber feature - Call the
Call Grabber Access number from
the Authorized Grabber phone to
grab the call from another client

Once all changes
are made select
Save Settings

AVRUM GROUP Welcome Renard Millen

Account

- Call Logs (Calls and Messages)
- Address Book (Contacts)
- Routing Rules
- Settings Services

SETTINGS - VOICE SERVICES

Services

Timezone	Eastern Standard Time
Authorized Grabber	8025551212
ID Restriction	Disabled
VSC PIN	1111
Call Return	Disabled
Auto Retrieve	Disabled

Parameters

VoIP Numbers	9198903464	
Call Grabber Access	exp_cg3	19195781285
	experius_cg2	*25
	exp_cg	9195218718
	exp_cg2	9195781285

Your PIN for use with vertical service code features.

Presence

On the Phone Presence	Enabled
Report when Inactive	Enabled
Inactivity Timer	30

Settings

- VOICEMAIL
- CONFERENCING
- CLIENTS

Actions

- SAVE SETTINGS

Settings - Voicemail

Update Voicemail settings, greetings and e-mail notifications.

End-User Portal Services - Voicemail Page

AVRUM GROUP Welcome Renard Milen

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Calls and Messages

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Settings Services

SETTINGS - VOICEMAIL

Settings

PIN: 1111

Notification: Enabled

E-mail Address: renard.milen@avrumgroup.com

Playback Options: Newest First

Parameters

Access Number: []

Standard Greeting: []

Active Greeting: Generic

Personal Greetings

Type: Name Announcement

Enable: No

Language: English (US)

[0:00]

UPLOAD REMOVE

Settings

VOICE SERVICES

CONFERENCING

CLIENTS

Actions

SAVE SETTINGS

Set PIN for accessing voicemail

Receive notification about new voicemails via email

Enter an e-mail address for notifications

Define voicemail message playback order (oldest or newest first)

The phone number that is used to dial voicemail

Once all changes are made select Save Settings

Parameters

Access Number: []

Standard Greeting: []

Active Greeting: ☒ Generic
Extended Absence
Busy and No Answer

Personal Greetings

Personal Greetings

Type: ☒ Name Announcement
Generic

Enable: ☐ Extended Absence
☐ No Answer
☐ Busy

Language: []

[0:00]

The solution offers pre-recorded greetings as an alternative to a personal greeting. A busy signal can also be played (ideal for common areas, fax machines, etc).

Enabling personal greetings overrides the default generic greeting. Users can upload personal messages for different situations.

Settings - Conferencing

Users with access to the MeetMe Conference service can customize their conference session settings.

The Chairperson PIN is the moderator's security code – it should not be provided to participants

Enabling Fast Start allows a conference call to start and participants to join before the arrival of the

Enabling End on Chair Exit disconnects all users when the Chairperson leaves the MeetMe Conference

The Access Number is the number users dial to access the MeetMe Conference service. In this example a short dial number (6338) has been enabled to speed access. External dial-in numbers are available. Contact your system administrator for more information.

AVRUM GROUP Welcome Renard Milen ?

Account

- Call Logs Calls and Messages
- Address Book Contacts
- Routing Rules
- Settings Services

SETTINGS - CONFERENCING

Settings

Chairperson PIN	7431
Fast Start	Enabled
End on Chair Exit	Disabled
Status IMs	Enabled
Participant Notification	Play Entry / Exit Tones
Recording Target	renard.milen@avrumgroup.com

Parameters

Access Number	6338	English
Access Code	9198903464	

Settings

- VOICE SERVICES
- VOICEMAIL
- CLIENTS

Actions

- SAVE SETTINGS

Once all changes are made select Save Settings

When using UC clients for PC, Mac, Smartphones, and tablets users choose to receive instant messages alerting them to the participants joining or leaving the conference

Participant Notification

- ✓ Play Entry / Exit Tones
- Play Name Announcement
- Do Nothing

Recording Target

When participants join a MeetMe Conference can play entry/exit tones, announce names, or be set to do nothing

End-User Portal Services - Conferencing Page

MeetMe Conference recordings will be sent to the e-mail address provided

Settings - Clients

Advance parameters are available for configuration and troubleshooting. Links to the PC and Mac UC clients are also available here if your system administrator has granted access.

Account information including: the primary SIP Server (proxy) the router port used for SIP traffic, your userid, and your organization's domain

AVRUM GROUP

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SETTINGS - CLIENTS

Parameters

SIP Proxy10.156.61.26

SIP Port5060

Useridrenardmilen

Domainexperius.com

Soft Client Downloads

PC Client Link

MAC Client Link

Settings

VOICE SERVICES

VOICEMAIL

CONFERENCING

Actions

None

End-User Portal Services - Clients Page

Download links for the PC and Mac UC clients