

COMMPORTAL/ACCESSION QUICK START GUIDE



Accession Communicator for Desktop & Mobile

Your Revere Systems phone service can be used to make or receive calls from your desk phone, computer, and your mobile devices. It uses the WiFi, broadband or mobile data services connected to your computer or mobile device, so you can make and receive calls (without using your mobile minutes). You'll need to install the Accession Communicator software on your computer, or app on your mobile device.

Accession Desktop

Ensure your Computer is Compatible

Accession Communicator for Desktop works on PCs running Windows 7 or Windows 8. It also runs on Macs that have OS X 10.7 or later versions.

You can use your computer's built-in microphone and speakers, but you'll have much better audio quality if you use a headset. Accession Communicator 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 Revere Systems CommPortal phone number and password. If you don't have this information, call us at 877-REVERE-4.

Download and Install the Software

Download Accession Communicator for Desktop at <https://commportal.reveresystems.com>. When prompted, save the file. Find the file in your downloads folder, open it, and follow the on-screen instructions to install the software.

Exploring Accession Communicator

- Make and receive calls
- Hold calls
- Transfer calls
- Make three-way calls

You can also send Instant Messages (IM), transfer files, and send Presence information to other people in your corporate directory who are using Accession Communicator (on any device).

Making Calls

Simply enter the number on the keypad or click on a contact's call button.

If your contact has more than one number, you can choose which number to call from the drop-down list. If the person you're calling has caller ID, they'll see your work phone number.

Receiving Calls

When someone calls your work number, you'll see a pop-up window appear on your computer and hear a ringing tone through your speakers or headset. The pop-up shows the number of the person calling, and if they're already in your contacts list, displays the caller's name.

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

During the Call

While a call is in progress, you can use the call window to:

1. Add a participant
2. Transfer the call
3. Perform a CRM look-up
4. Put the call on hold
5. Send video
6. Mute your microphone
7. Adjust the volume
8. Access the keypad
9. Record the call (where allowable)
10. Merge calls
11. End the call

You may receive a call while you're already on another call. If you answer the new call, the current call is automatically placed on hold and the new call appears in a new call progress window. Switch between the two calls using the window for each, or click on the Merge calls icon to merge them into a single call.

Video Calling

If the person you're talking to is also using Accession Communicator on the same network, you can upgrade your call to video at any time. Click on the Video icon to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the Video icon at any time to turn off your video feed.

Transfer the Call to Someone Else

Use the Call Transfer icon to send any call to another number. A menu will pop up allowing you to select a contact, or you can type in a completely new number. You can also transfer the call to another of your devices that has the Accession Communicator installed, without having to hang up.

Instant Messaging (IM)

If you have Accession Communicator with Instant Messaging, click on a contact's Chat icon to send them an IM.

Within the chat window, you can send files, view your chat history with the contact, and add participants to the conversation.

Reject Call with IM

If the caller is in your Contacts list, you can reject a call and send the caller in IM explaining why you can't take the call. Click the drop-down list next to Reject and select one of the system messages, or click Custom Message to type your own message.

Presence

Let others know whether you're available or busy by setting your presence to Online or Busy. Your Presence information automatically shows when you're Away, On the Phone, or In a Meeting (by referencing the information in your Outlook calendar).

Call Manager

You can tell Accession Communicator how to handle your incoming calls. Click on the Presence selector, expand the Available option and choose between:

If you select Do Not Disturb, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring, so be sure to use it carefully.

You can select Forwarding to forward all incoming calls to another number. You're then prompted to enter the number you want to forward calls to.

When you change your Presence or Call Manager settings, the change applies to all of your Accession Communicator devices. So if you step away from your computer and forget to update your status, you can change it using the Accession Communicator app on your mobile phone instead.

Choosing Which Calls to Receive

You can specify how calls should be handled if they're from anonymous numbers, VIPs or any numbers on your Unwanted Callers list. To do this, click on the Presence selector, expand the Available option, and select the View All Settings option at the end of the menu. This opens the Call Manager Status window, where you can set your call handling preferences.

Your Contacts List

Accession Communicator assembles a contact list for you. Depending on how your service is set up, the contact list may include:

- Contacts that you type directly into Accession Communicator
- Contacts in the address book stored locally on your computer
- Contacts in CommPortal contacts
- Contacts in your corporate directory

Visual Voice Mail

If you have a voice or video message, the Message button changes color and indicates the number of messages received. Click this button to see a list of messages received, to see transcriptions of the message into text (where available), or to listen to the messages.

Favorites

For quick access to frequently-called people, add the contact to your Favorites list. Right-click on any contact listed and choose Add to Favorites from the drop-down list. Favorites appear in the Favorites list and in the Contacts list.

Privacy & Protection

If Accession Communicator is configured to automatically sync with Outlook, you can view and edit your Outlook contacts using Accession.

Accession Mobile

Ensure your Device is Compatible

Accession Communicator for Mobile works on Android phones and tablets with ARM chips running 2.3.3 (Gingerbread) or later version, and iPhone 3GS, 4 and 4S and iPad running iOS5 or later.

Find Your Password

You'll need your Revere Systems CommPortal phone number and password. If you don't have this information, call us at 877-REVERE-4.

Download and Install the App

Search for Accession in Google Play or the App Store and touch Install to download the app to your device. Check the Terms & Conditions and touch Accept & Continue.

Tap Open on the app and select Revere as your carrier. Enter your Revere CommPortal phone number and password and tap Log in.

To be able to switch calls to your own cellular network, enter your own mobile phone number and tap Continue.

Exploring Accession Communicator

- Make and receive calls
- Hold calls
- Transfer calls
- Make three-way calls
- Push and pull calls to other twinned devices mid-call

You can also send messages to other people in your corporate directory who are using Accession Communicator (on any device). Tap the Menu icon or swipe right on the screen to view the Accession mobile menu.

Making Calls

To make a call, select the Dialer tab and enter the number, or simply tap on the contact and touch the number you would like to use. If the person you're calling has caller ID, they'll see your work phone number.

Receiving Calls

When someone calls your work number, depending on the services you have, you may see the incoming call on your desk phone, computer, mobile or tablet. You can answer the call on whichever device is most convenient for you.

During the Call

While a call is in progress, you can use the call window to:

- Put the call on hold
- Mute your microphone
- Access the keypad
- Turn on speaker
- Send video
- Switch the call to another device
- Merge calls
- Transfer the call

You may receive a call while you're already on another call. You can hold the existing call and answer the new call, end the existing call and answer the new call, or ignore the new call.

Video Calling

If the person you're talking to is also using Accession Communicator and your phone has a front-facing camera, you add video to your call at any time. Click on the Video icon to send your video. The other person will receive a prompt inviting them to switch on their video too. Click on the Video icon at any time to turn off your video feed.

Switch the Call to Another Device

If the call has poor audio due to an unreliable WiFi or mobile data service connection, you can touch the Switch icon and select This device (cellular) to move the call to your regular cell phone. Remember that the call will now start to use your mobile minutes.

Alternatively, you can choose to push the call to another of your devices running Accession Communicator, such as your desktop or your tablet. Touch the Switch icon and select Another device to push the call to whichever device is most convenient.

Call Pull

You can also pull calls from your other devices onto your mobile. If a call exists that can be pulled, the menu displays a Call Available to Pull option. Tap this option and follow the on-screen prompts to pull the call from your other device onto your mobile.

Transfer the Call to Someone Else

Use the Call Transfer icon to send any call to another number. A menu will pop-up allowing you to select a contact, or you can type in a completely new number. You can also transfer the call to another of your devices that has Accession Communicator installed, without having to hang up.

Call History

See your full call history by selecting the Call History tab.

Instant Messaging (IM)

Tap the Chat tab to use Instant Messaging. Enter your Chat address and password and tap Sign in. You can then select a contact to send an Instant Message to.

Within the chat window, you can start or continue a conversation, send files, call a contact, or add one or more participants to a conversation.

Voicemail

If you have a voice or video message, the Messages tab indicates the number of messages received. Select the Messages tab and tap a message to listen to it.

Call Manager

You can tell Accession Communicator how to handle your incoming calls. Tap the Call Manager tab and select Available, Do Not Disturb or Forward All Calls.

If you select Do Not Disturb, callers hear a recorded voice announcement saying that you are unavailable and are then connected to your voicemail. None of your devices will ring, so be sure to use it carefully.

You can select Forward all calls and, in the Forwarding number box, enter the number you want to forward all calls to. When you change your Call Manager settings, the change applies to all of your Accession Communicator devices.

Your Contacts List

Accession Communicator assembles a contact list for you. Select the Contacts tab to view. Depending on how your service is set up, the contact list may include:

- Contacts that you type directly into Accession Communicator
 - Contacts stored in your mobile device
 - Contacts in CommPortal contacts
 - Contacts in your corporate directory
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Settings

Use the Settings tab to manage your Call, Chat, Contact and Messaging settings, and to access additional setup options. You can also send error reports from the Settings tab.

Presence

Whenever one of your contacts is signed in to their Chat account, Accession Mobile displays their presence information on the Messages, Call History and Chat tabs.

Emergency Calls

If you place a 911 call from Accession Communicator, the 911 operator may not be able to identify where you are calling from.