

**Porta  Phone**



**User Guide**

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**PortaPhone User Guide, February 2011**

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## Preface

This document provides a general overview of PortaPhone application.

### Where to get the latest version of this guide

The hard copy of this guide is updated at major releases only, and does not always contain the latest material on enhancements occurring between minor releases. The online copy of this guide is always up to date, and integrates the latest changes to the product. You can access the latest copy of this guide at: [www.portaone.com/support/documentation/](http://www.portaone.com/support/documentation/)

## Conventions

This publication uses the following conventions:

- Commands and keywords are given in **boldface**
- Terminal sessions, console screens, or system file names are displayed in fixed width font



**Exclamation mark** draws your attention to important information or action.

**NOTE:** Notes contain helpful suggestions about or references to materials not contained in this manual.



**Timesaver** means that you can save time by taking the action described in the paragraph.



**Tips** provide information that might help you solve a problem.

## Client System Requirements

- OS: Windows XP/Vista/7 x32
- 512 RAM, minimum CPU speed: 1GHz, 30 Mb of space available
- Headphones, speakers

# 1 . Introduction

PortaPhone is a program that allows you to send and receive VoIP calls as well as exchange instant messages from your PC. It is simple to install and easy to employ, so it can be used by virtually anyone.

## Features Overview

### Call Features:

- Support for the following codecs: G.711 (PCMU and PCMA), iLBC, GSM, G.722 (HD-Audio), SPEEX
- DTMF support
- Blind Transfer
- Call Hold
- Caller ID

### Presence:

- Presence status for contacts
- Presence status for your own users
- Supported content PIDs

### Instant Messaging:

- Chat
- Chat history
- Ability to add users to a contact list from chat

### Contact List:

- Ability to assign several numbers for one contact
- Ability to call a contact by number
- Contact groups
- Contact avatar

### Call History:

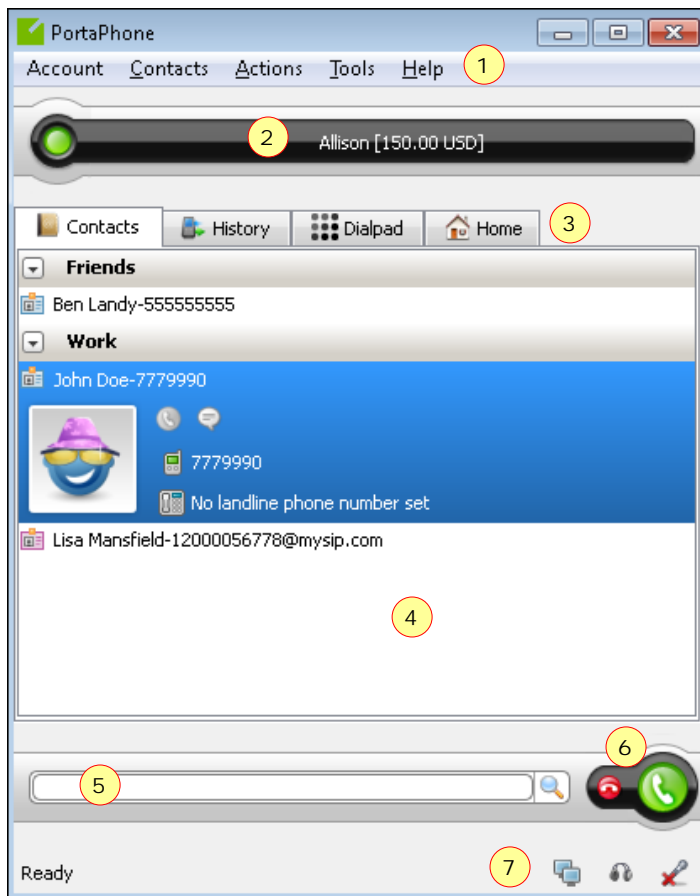
- Ability to show call details
- Ability to store a number from the call history as a contact
- Ability to re-dial a number

### Management:

- Show account's balance
- Show user's details
- Manage by several accounts
- Register account from profile

# 2. PortaPhone Interface



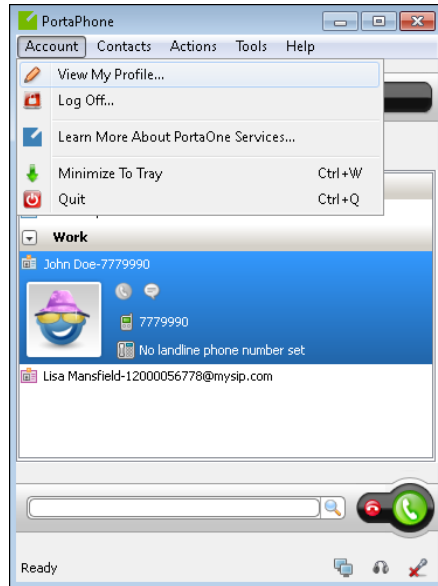


1. Main menu
2. Balance and user's presence status
3. Action bar
4. Information window
5. Search window
6. Call start/end buttons
7. Action buttons

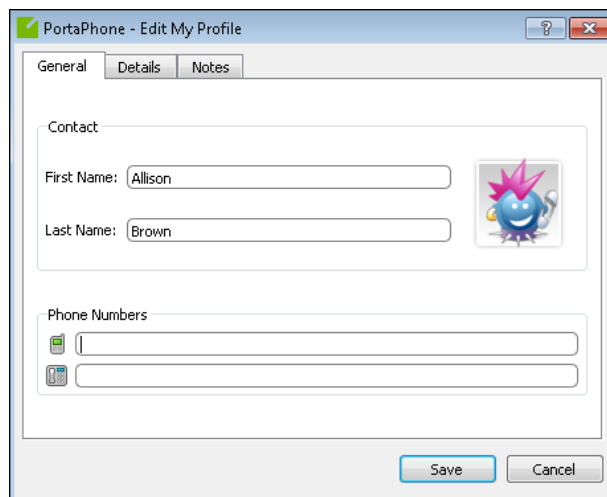
## Main Menu

The main menu contains the following items: Account, Contacts, Actions, Tools and Help.

## Account Menu



**View My Profile** allows you to edit the personal information in the currently selected profile. To change the avatar, click on the picture to the right.

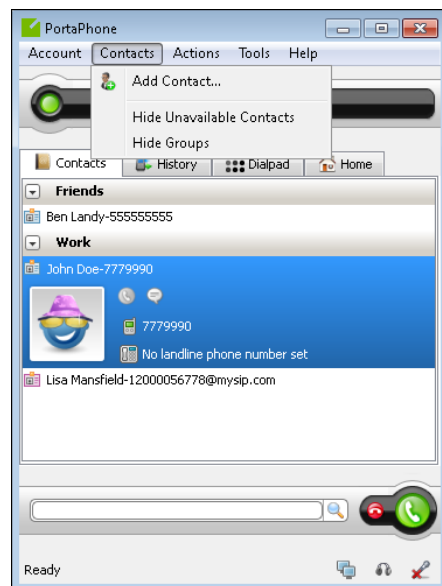


**Log Off** will terminate your current session in PortaSwitch and allow you to log in using a different profile, or create a new profile.

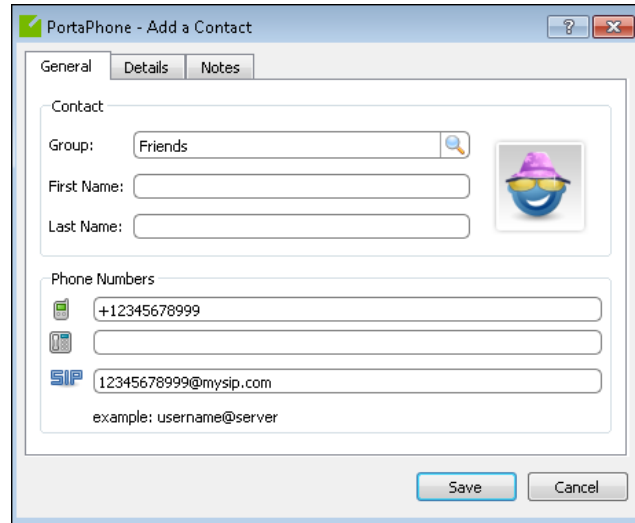


**Minimize to Tray** hides the PortaPhone application from your screen (however, the application is still running and is accessible via its icon in the taskbar), while **Quit** closes your current session and terminates the application.

## Contacts Menu



This menu allows you to add new contacts. You will see a window where you can input the necessary contact information. You can also specify the name of the group to which the new contact will belong.



**NOTE:** You must provide information in the **SIP** field for the contact in order to be able to call or exchange messages with him or her later.

If you see the icon in front of the contact, it means that SIP ID was not specified for this particular contact and the icon indicates that the SIP ID was defined. The colored circle in front of the contact indicates that SIP ID was set and presence activated and it shows the status (online, away and etc.) of this account. To activate presence check the box **Activate presence and chat** while login.

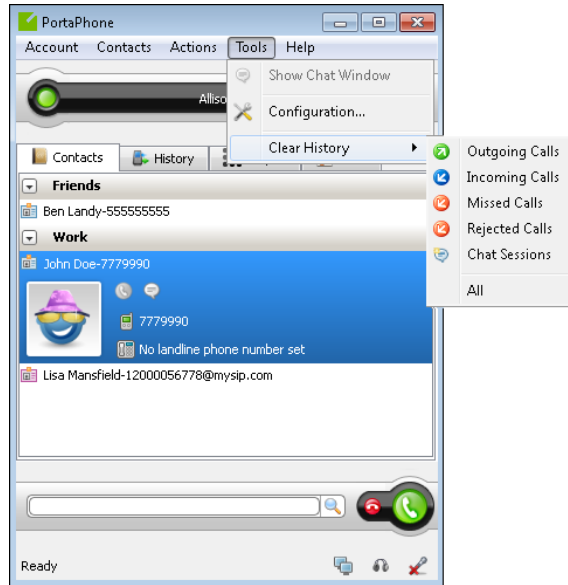
## Actions Menu

You can accept, hang up, or hold / resume a call using this menu.

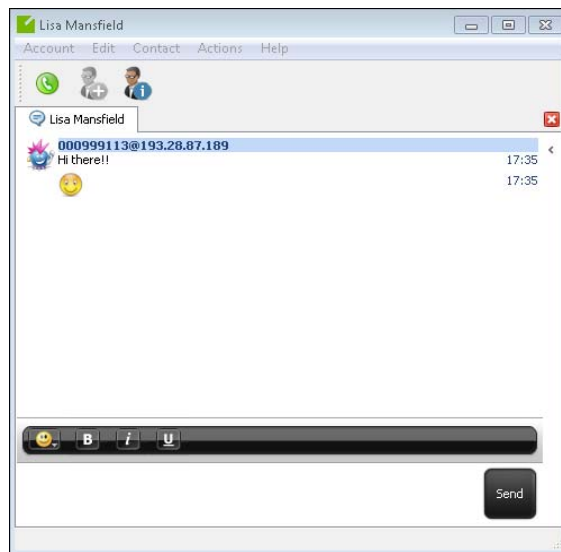


## Tools Menu

This menu allows you to show a chat window, configure your PortaPhone settings, and clear the history for calls or chat messages.



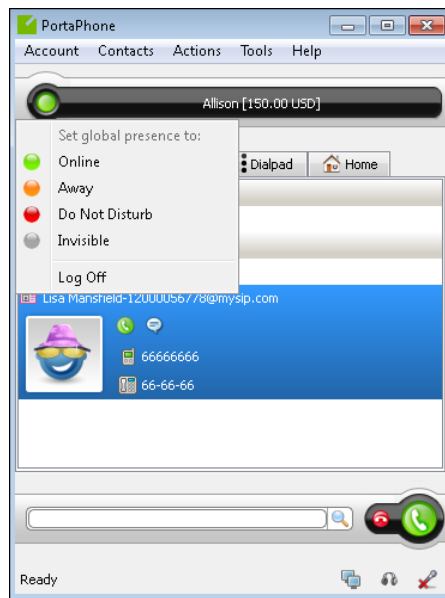
The chat window helps you to communicate with other users. You can also call a user from this window, view his information, save chat messages, and so on.



## Help Menu

This menu contains general information about PortaPhone.

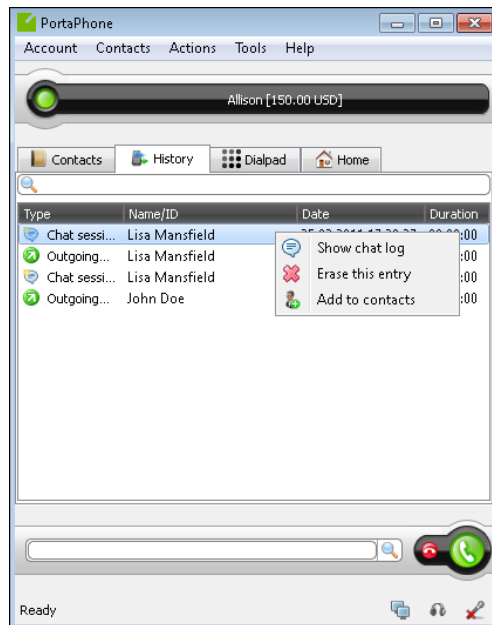
Below you can see the line showing your current balance and presence status.



## Information Window

This window has four functional tabs: **Contacts**, **History**, **Dialpad**, and **Home**.

All of your contacts are shown in the **Contacts** tab, and you can expand and hide information about them. The **History** tab shows the call and chat history. The **Dialpad** window allows you to dial a number manually or enter DTMF tones when a call is connected (this is required to select actions in IVR systems). The **Home** tab provides brief information about PortaPhone, and has a link to PortaOne's web site.



The search window allows you to search contacts by country code, number, or nickname.

The **call start / end** buttons are for initiating or ending a call.

The action buttons show you the status of your session, and also allow you to adjust the output / input volume.

# 3. PortaPhone Installation

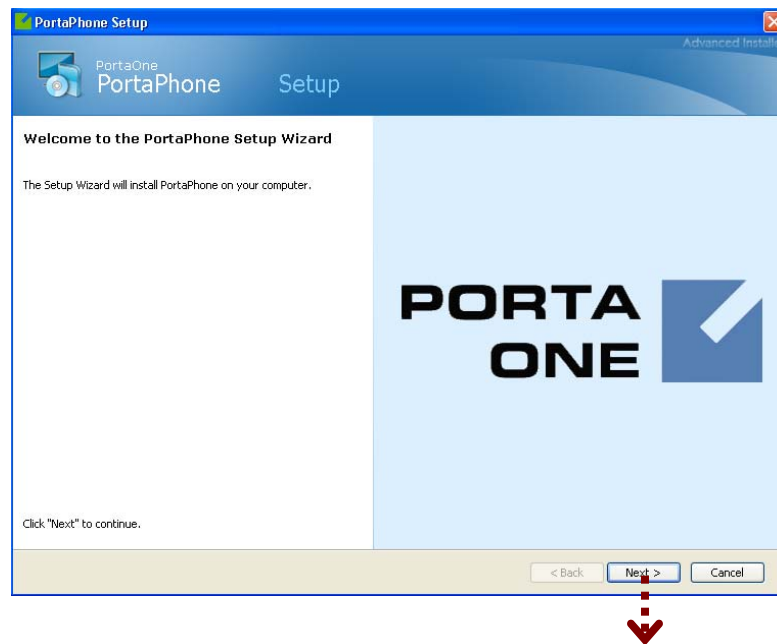


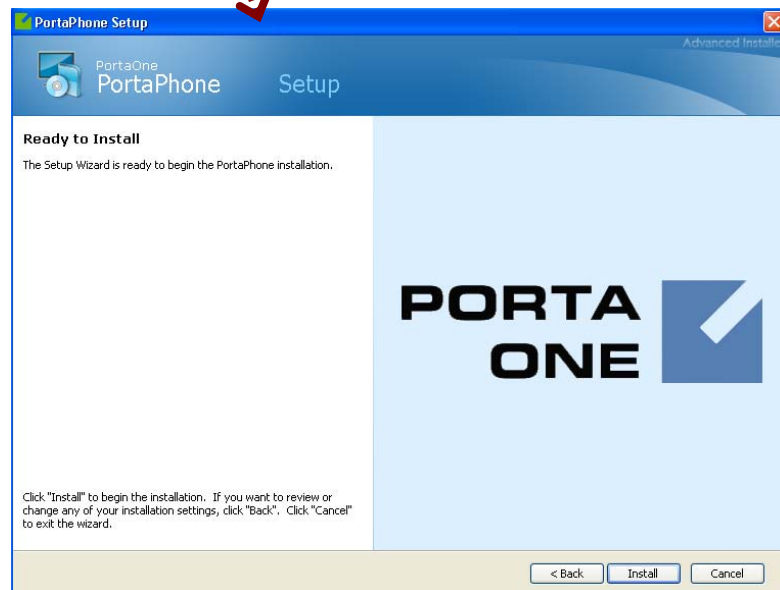
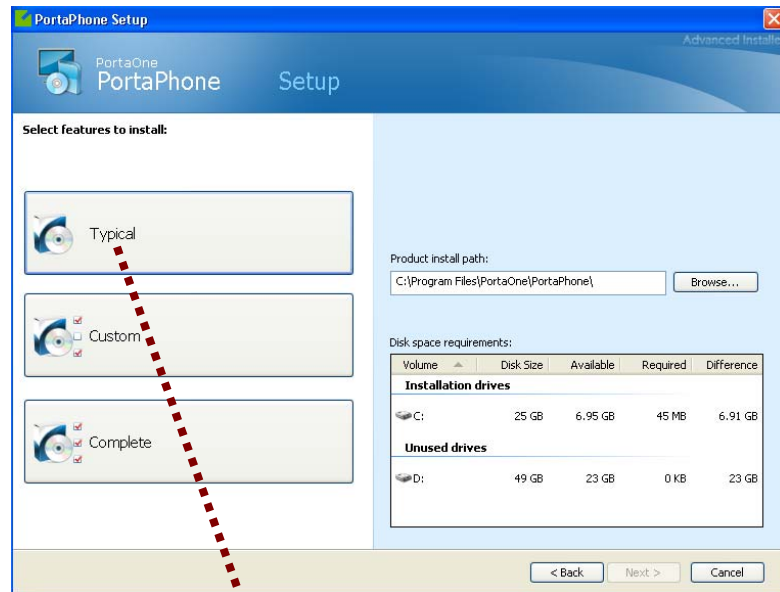
After you have downloaded the installation file to your computer, launch it by double-clicking on the file in Windows Explorer or in the Downloads window.

If you see a security warning similar to the one below, uncheck the **Always ask...** checkbox, then click **Run** to continue the installation.

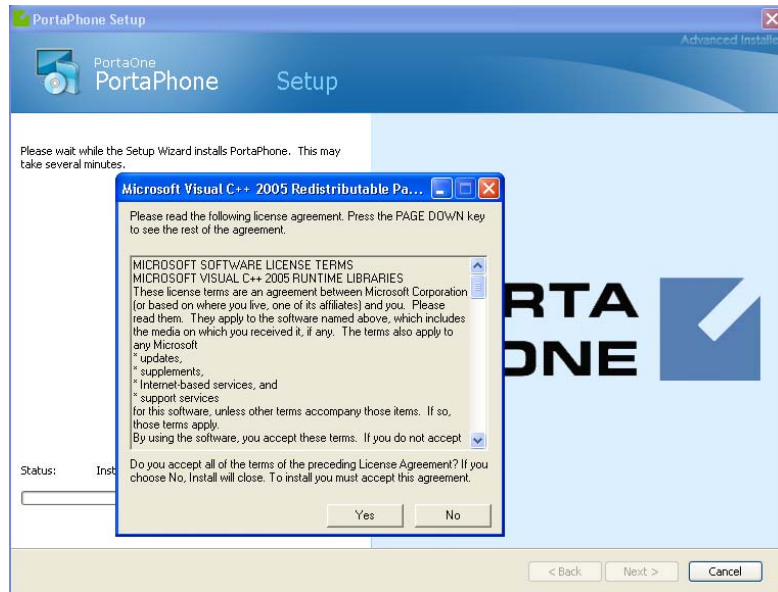


When the PortaPhone installation program starts, click **Next** to proceed to the next screen, then click on **Typical** to start the installation.

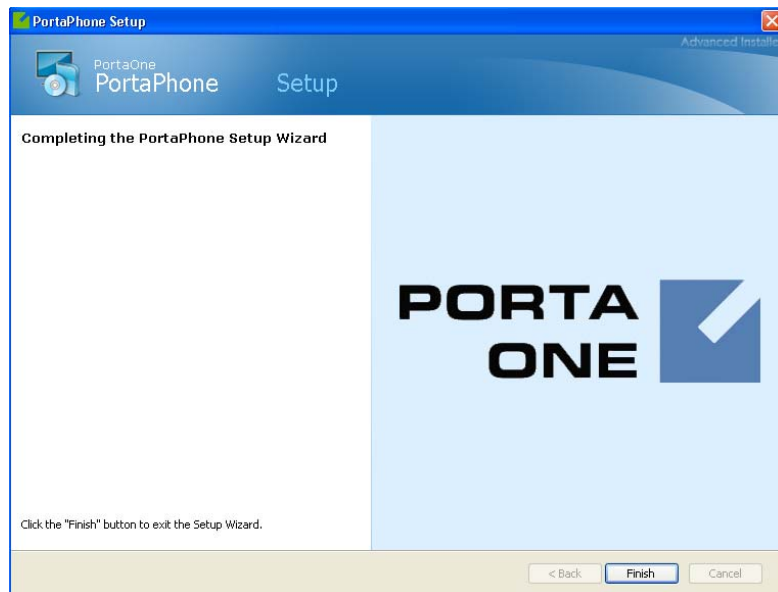




If your PC is missing up-to-date Microsoft libraries, you may see an additional dialog box which will prompt you to install them. Answer **Yes**, since these libraries are essential for the proper operation of PortaPhone.



Finally, when the installation is finished, you will see the following screen. Click **Finish** to exit the installation program. You can now launch PortaPhone via the Start menu (PortaOne > PortaPhone).

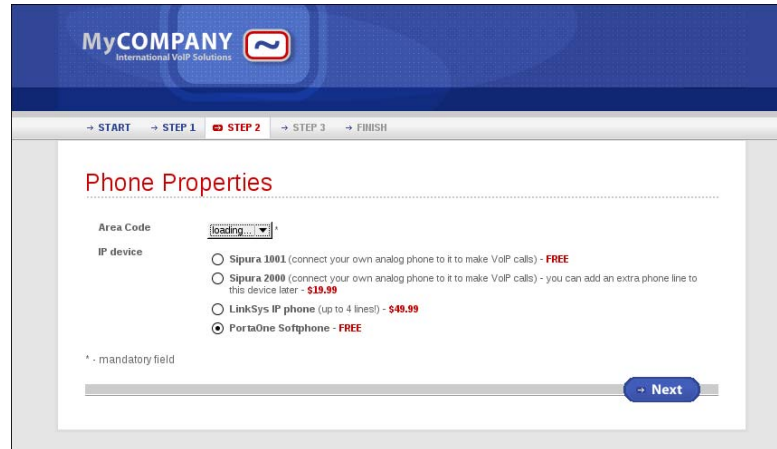


# 4. PortaPhone Configuration

You can configure PortaPhone in two ways: automatically and manually.

## Automatic Configuration

As a part of the web sign-up process, you will choose what type of communication device to use (e.g. specific model of IP phone or ATA). The PortaPhone communication client is one of the available choices.

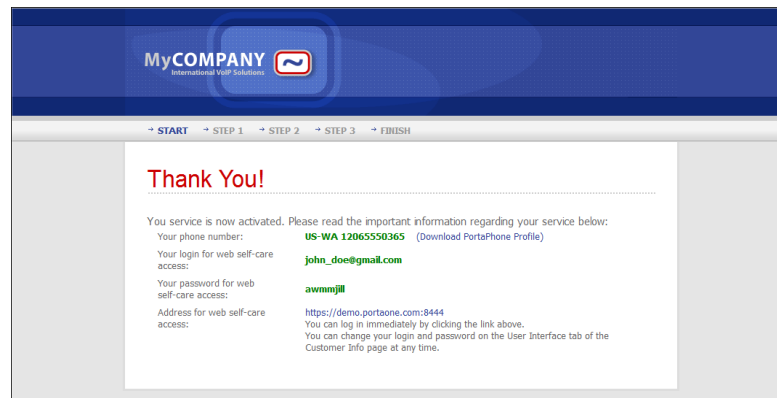


The screenshot shows the 'Phone Properties' step of the MyCOMPANY web sign-up process. The page has a blue header with the MyCOMPANY logo and 'International VoIP Solutions' text. Below the header is a progress bar with 'STEP 2' highlighted. The main content area is titled 'Phone Properties' and contains a form with the following fields and options:

- Area Code: A dropdown menu currently showing 'loading...'.
- IP device: A radio button selection with four options:
  - Sipura 1001 (connect your own analog phone to it to make VoIP calls) - **FREE**
  - Sipura 2000 (connect your own analog phone to it to make VoIP calls) - you can add an extra phone line to this device later - **\$19.99**
  - LinkSys IP phone (up to 4 lines!) - **\$49.99**
  - PortaOne Softphone - **FREE**

At the bottom of the form, there is a note: '\* - mandatory field' and a blue 'Next' button.

If you select PortaPhone as your preferred communication client, upon completion of the web sign-up procedure you will see links for downloading the PortaPhone installation file and configuration file (please contact PortaOne support team for assistance in configuring the sign-up). When you download this file and open it in PortaPhone, it will provision all the required information about your account settings (e.g. SIP proxy address, username, password, etc.), so that no further configuration is required.



The screenshot shows the 'Thank You!' page of the MyCOMPANY web sign-up process. The page has a blue header with the MyCOMPANY logo and 'International VoIP Solutions' text. Below the header is a progress bar with 'STEP 2' highlighted. The main content area is titled 'Thank You!' and contains the following information:

You service is now activated. Please read the important information regarding your service below:

- Your phone number: **US-WA 1206550365** (Download PortaPhone Profile)
- Your login for web self-care access: **john\_doe@gmail.com**
- Your password for web self-care access: **awmmjll**
- Address for web self-care access: **https://demo.portaone.com:8444**  
You can log in immediately by clicking the link above.  
You can change your login and password on the User Interface tab of the Customer Info page at any time.

First download and install PortaPhone, then click on the **Download PortaPhone Profile** link.

## Manual Configuration

If PortaPhone was not configured automatically, when you start it for the first time you will see the **Create New Profile** screen. (You can also access it using the **Configure a New Profile** button on the **Login** screen).



Field	Description
<b>Login / Username</b>	Your SIP phone number
<b>Password</b>	Your SIP password
<b>SIP domain / Realm</b>	IP address (or hostname) of your PortaSIP server
<b>Caller Info</b>	The additional info the called party will see along with your phone number

Press the **Connect** button and the installation will be completed.

The PortaPhone display should be similar to the one in the screenshot below.

