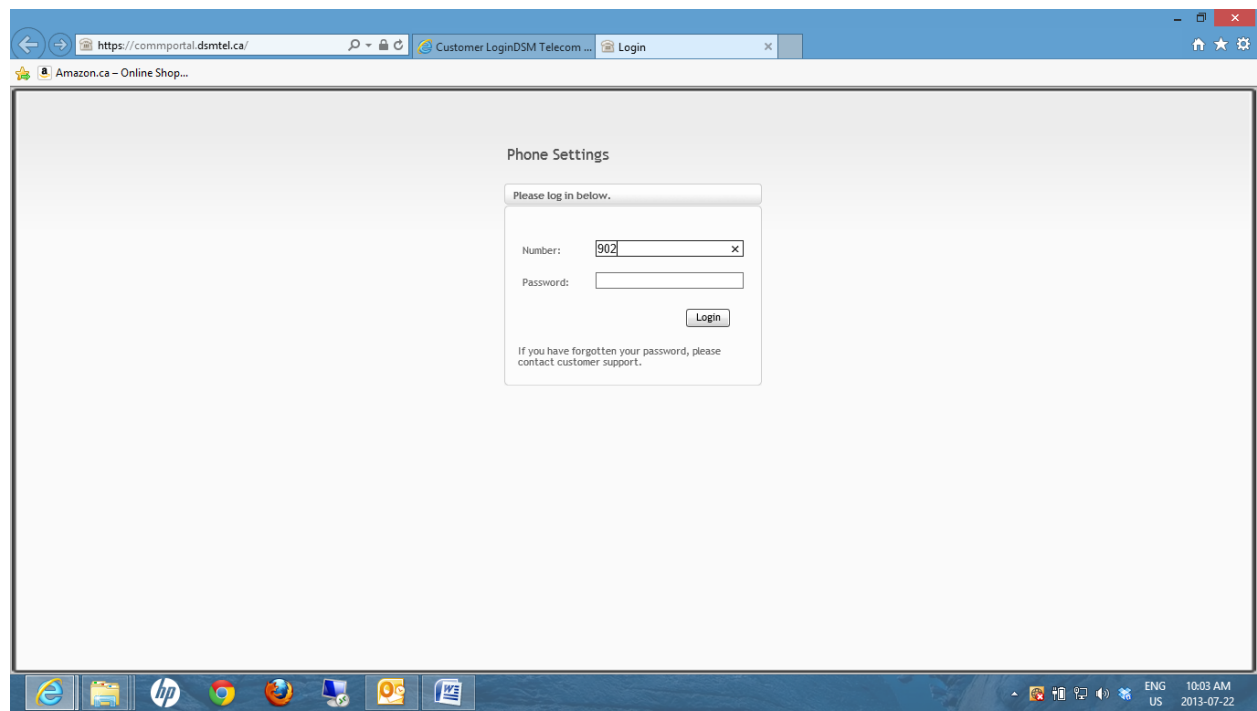# DSM CommPortal Training Guide
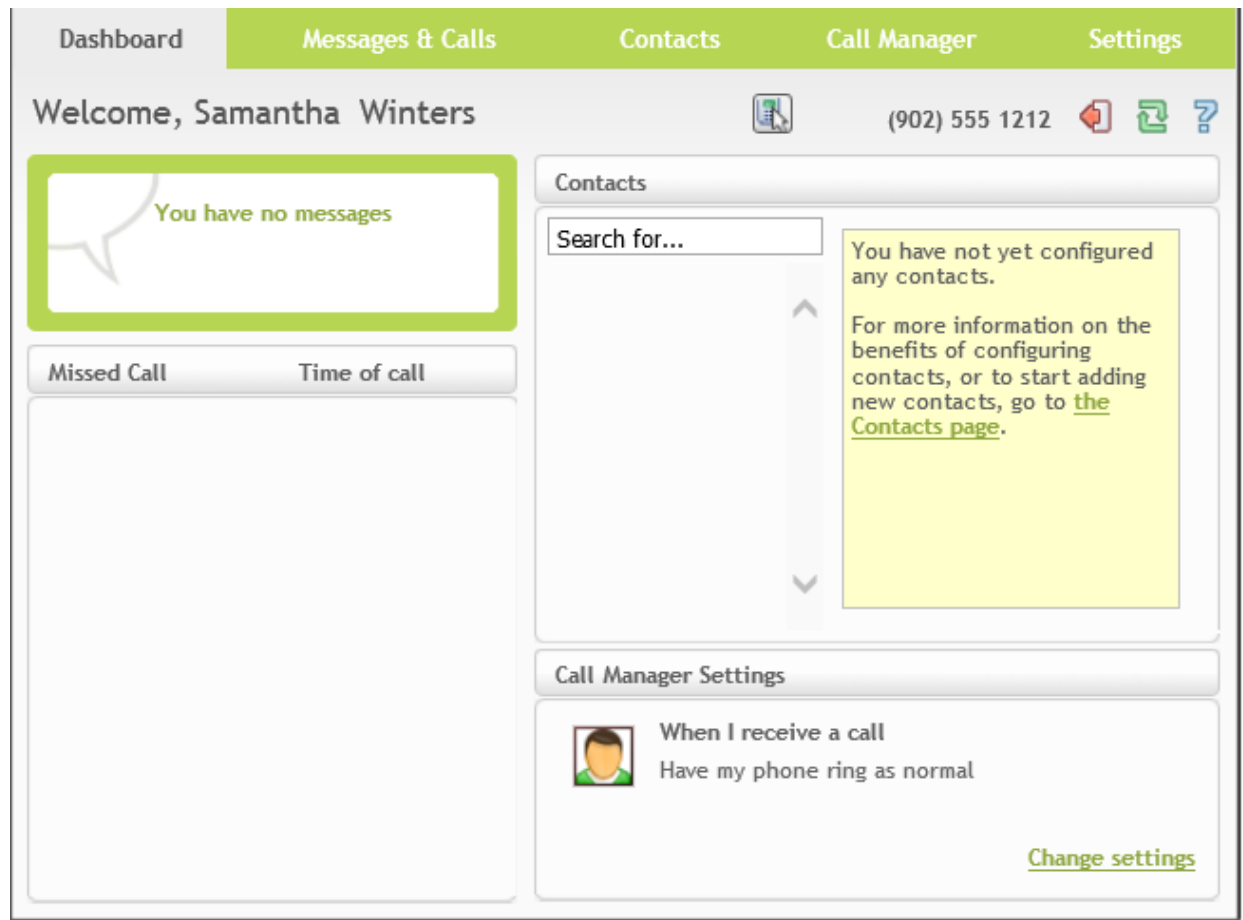
-Go To DSMTEL.COM

-select "Customer Login"

-select "Individual Login"

-enter your telephone number (include 902, with no dashes)

-enter your password (2015 is the default password)
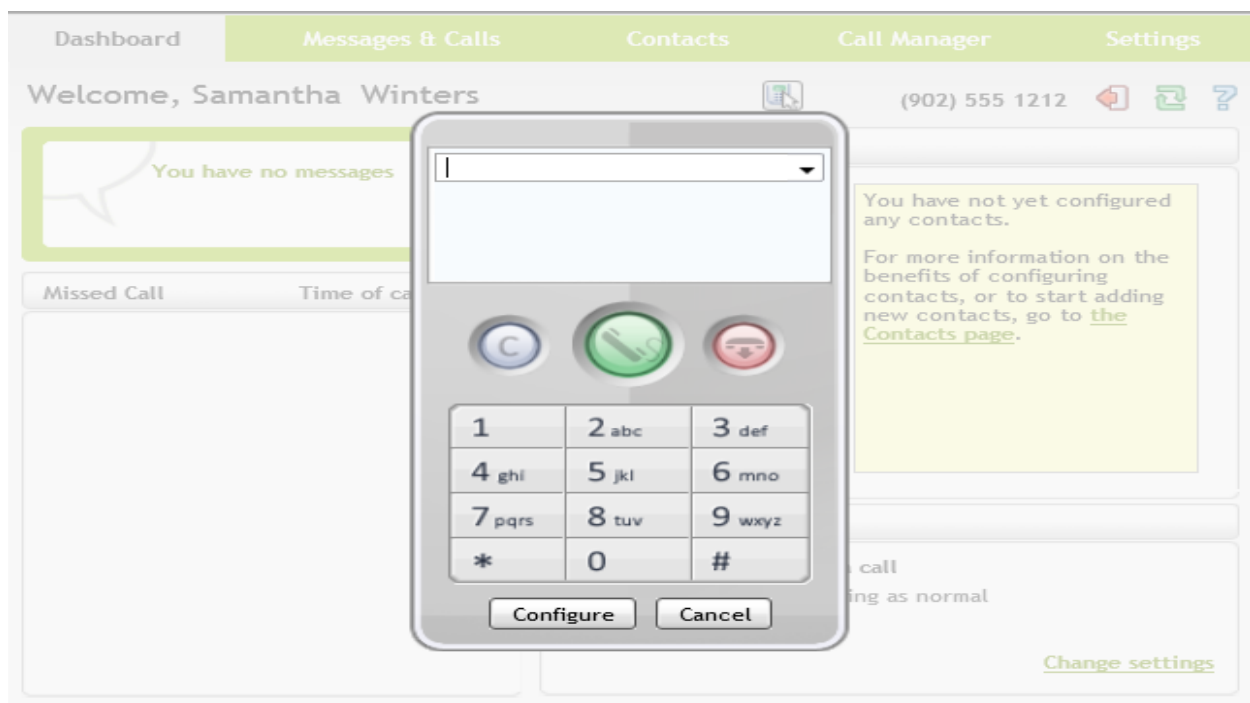
-select "Login"

Dashboard

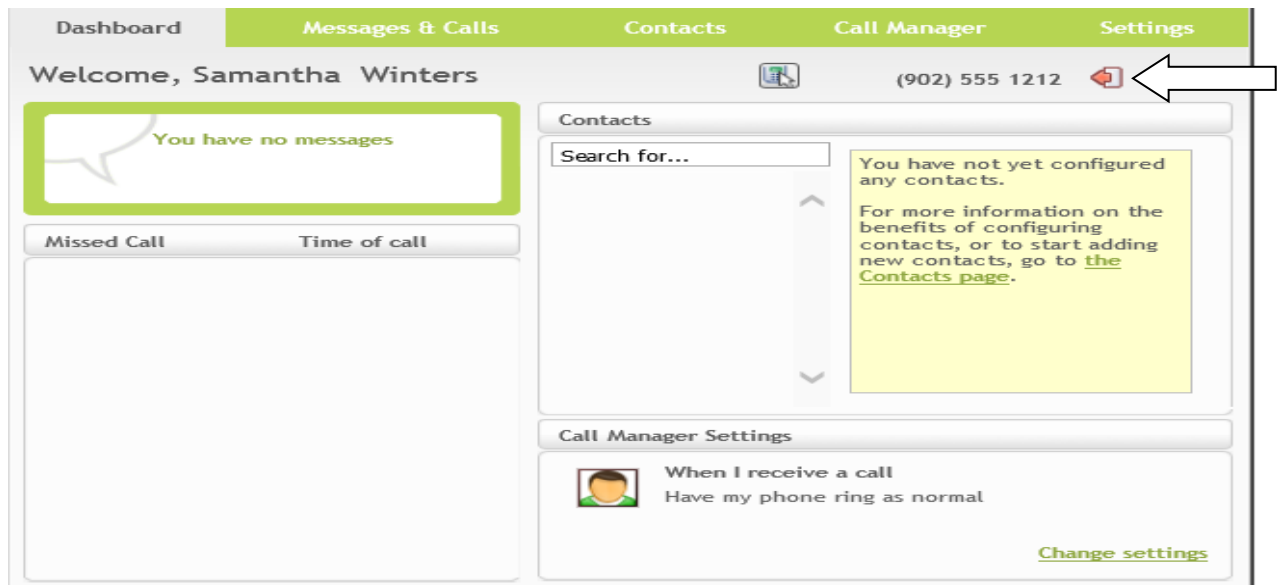This will give you a quick snap shot of your mail box and how it has been set up

It will tell you:

-how many messages you have..

-list all missed calls and the time they were received..

-any contacts that you have configured..

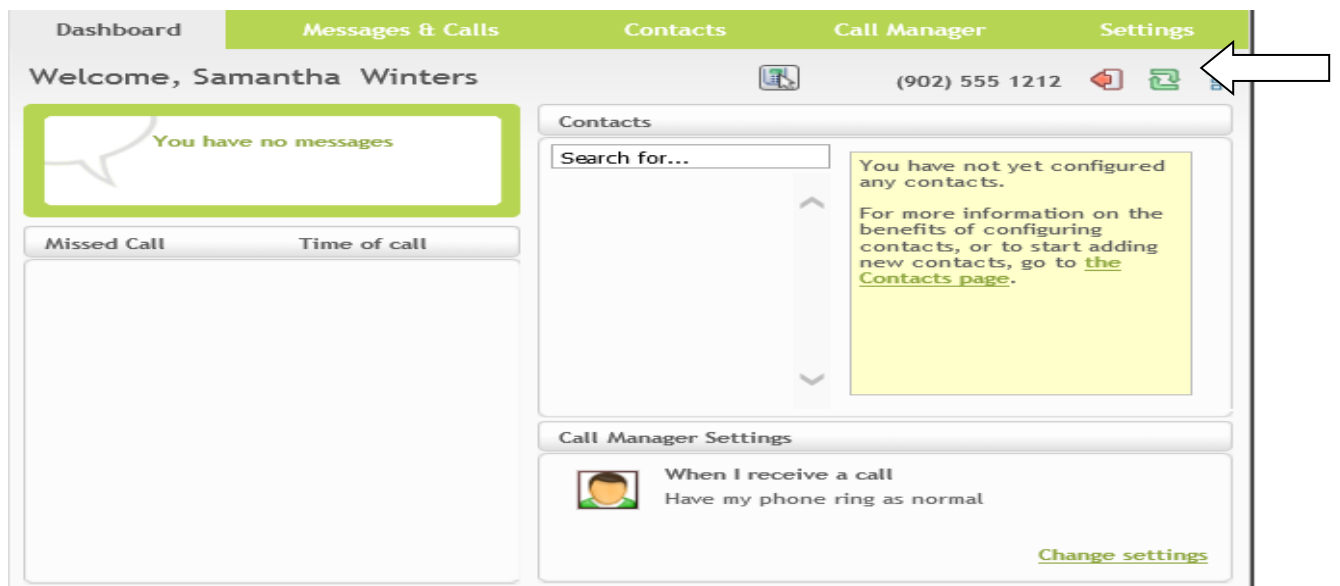-it will tell you if you have any specific settings set up for your calls

-The small key pad will allow you to dial out from the CommPortal if you are somewhere and want to have your call dial out from your office phone
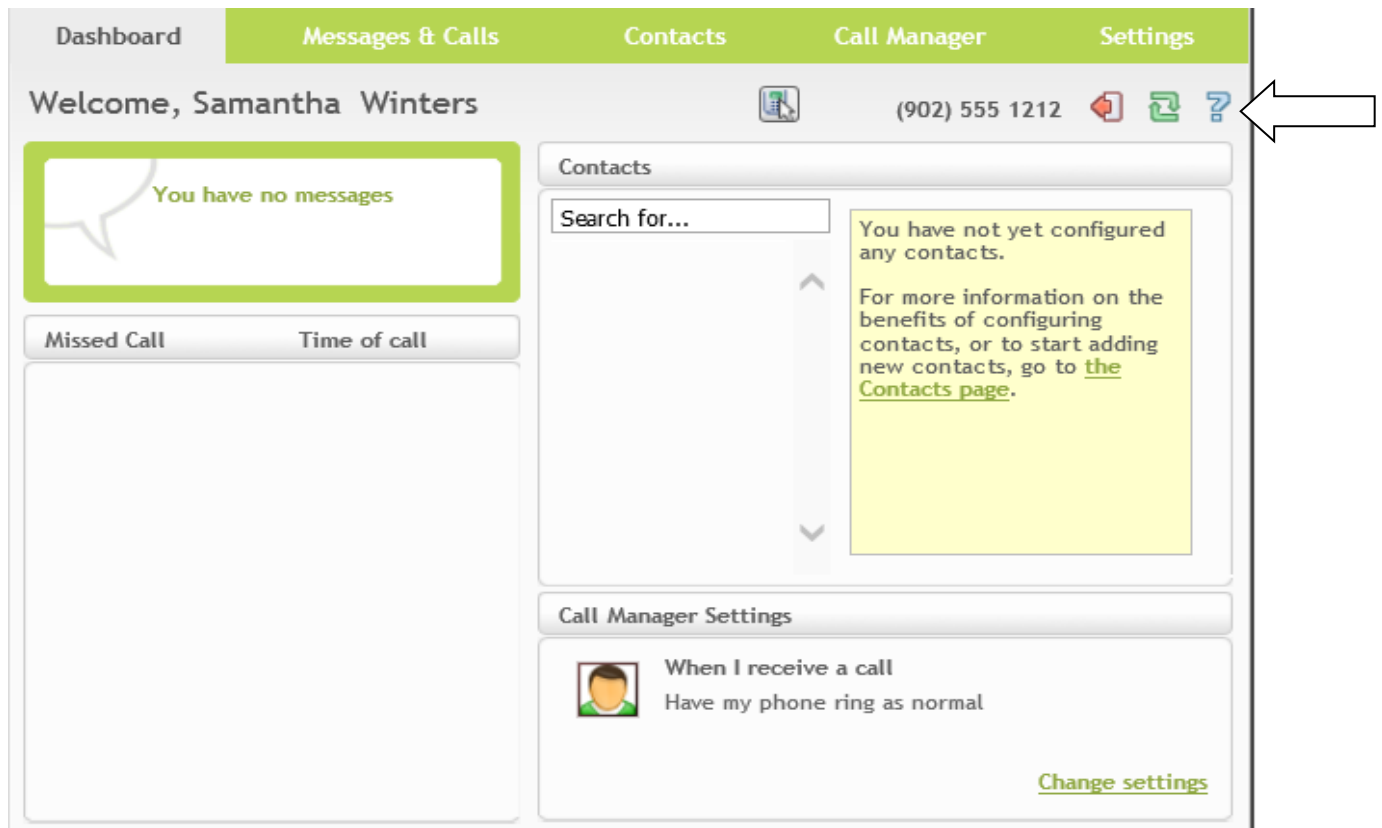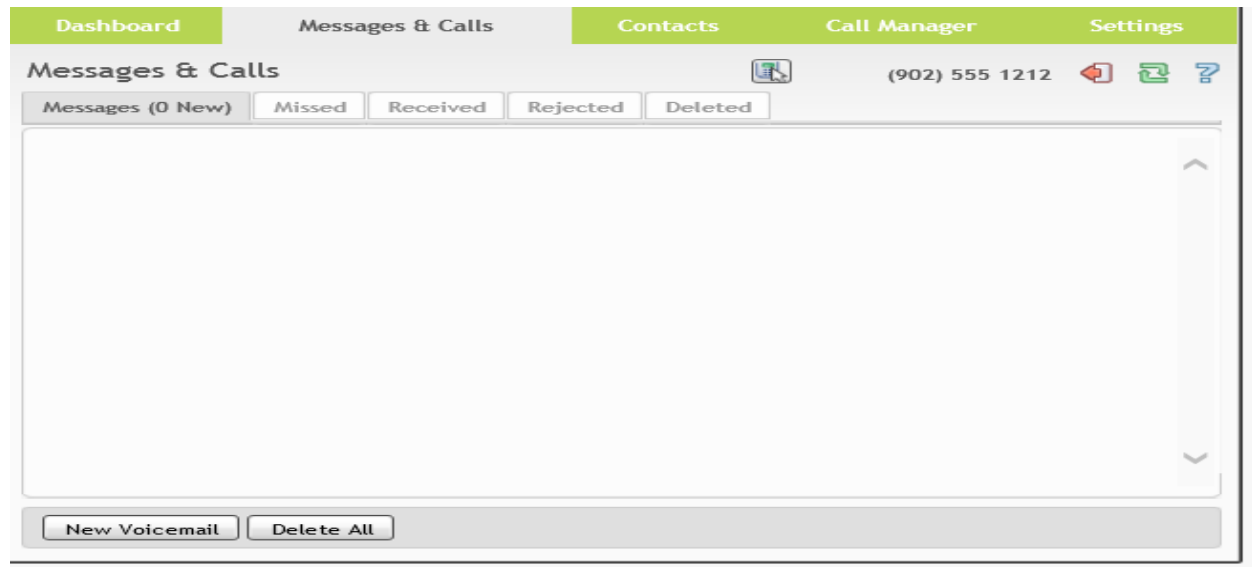
-the red arrow is your log out button

-the square of arrows is the refresh button

Dashboard | Messages & Calls | Contacts | Call Manager | Settings

Welcome, Samantha Winters   (902) 555 1212

Contacts

Search for...

You have not yet configured any contacts.

For more information on the benefits of configuring contacts, or to start adding new contacts, go to the Contacts page.

Missed Call | Time of call

You have no messages

Call Manager Settings

When I receive a call
Have my phone ring as normal

Change settings

-the ? is the help button. It will provide assistance for the page you are on

Messages & Calls tab

It will tell you:

-how many messages you have.. and list them for you

-it will list the name if the caller has name display, if not it will list the #

-list all missed calls and the time they were received..

-list all call you have received

-list all calls you have rejected (rules)

-list all messages that you have deleted. you can retrieve any messages that are listed here

Contacts Tab

Contact list

This page will enable you to manage your contacts so you can access them from anywhere you are with access to the internet
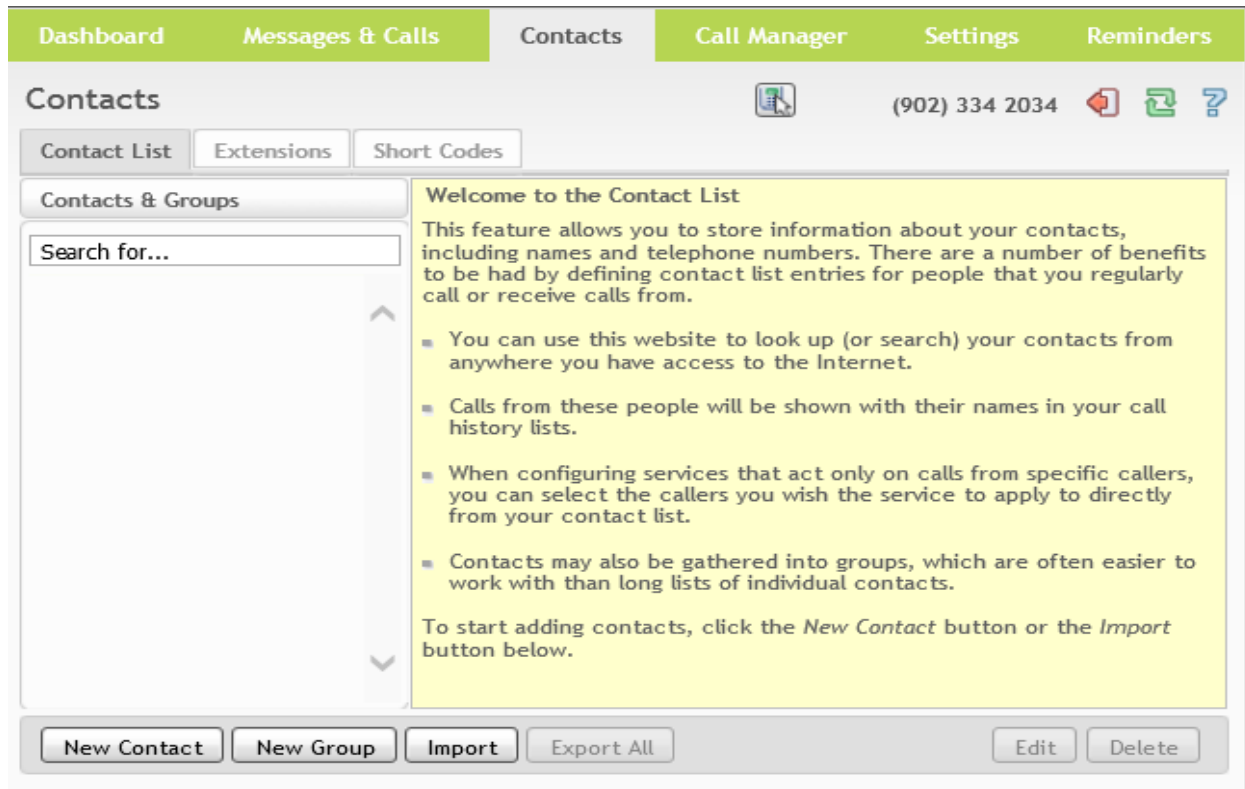
You can add contacts similar to adding them in Outlook

Extensions
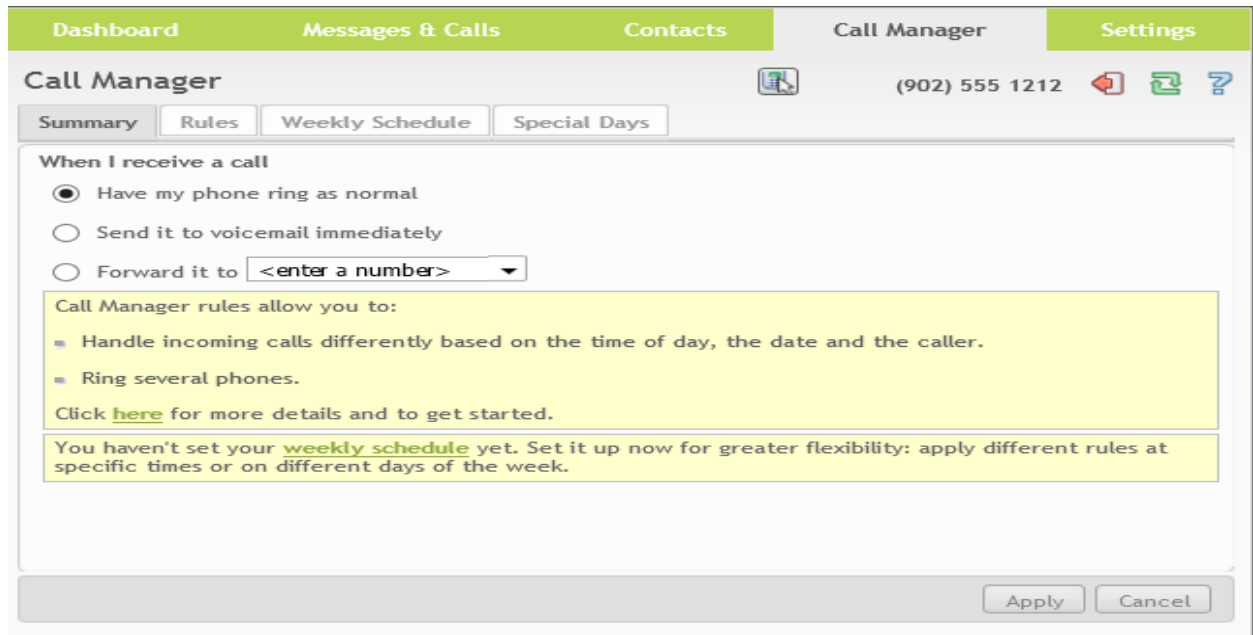
The extensions tab will list all extensions that are within your customer group

 If you see a picture of a head beside a name, that means that that person has administrator rights

Call Manager Tab

Summary

This is the tab that will allow you to manage how your calls will be answered and under what conditions
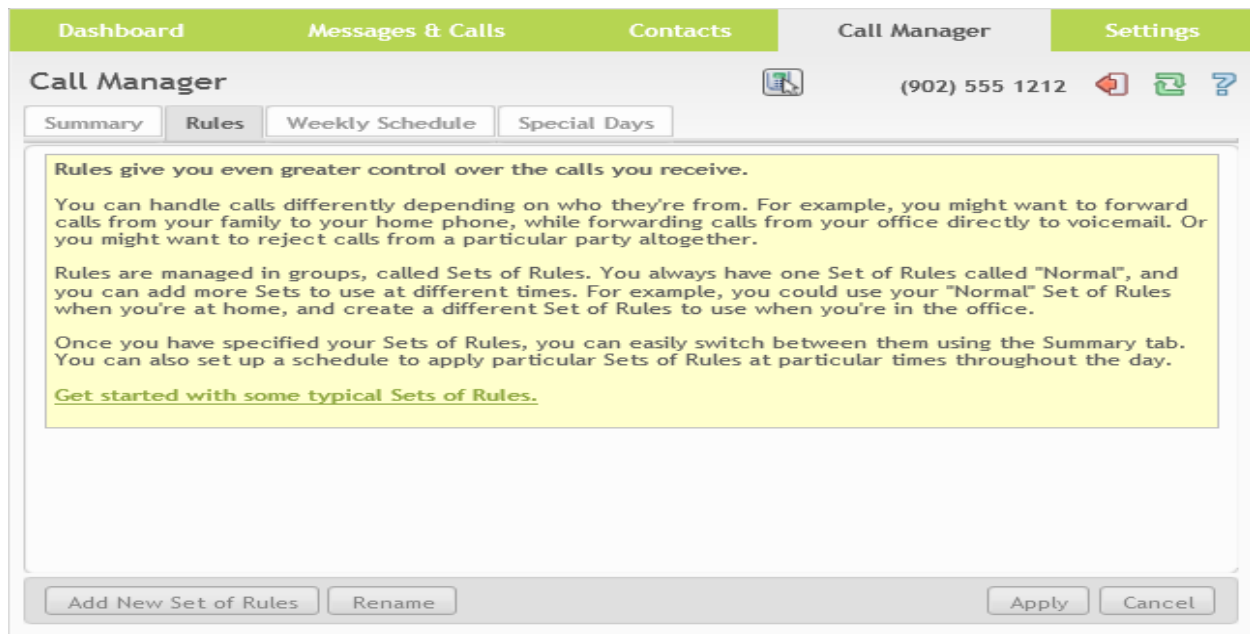
This page will allow you to set up one of the following:

-Will my calls be answered as normal..

-Will I send all my calls directly to VM..

-Will I forward all my calls to another telephone number (enter the 10 digits with no dases)..

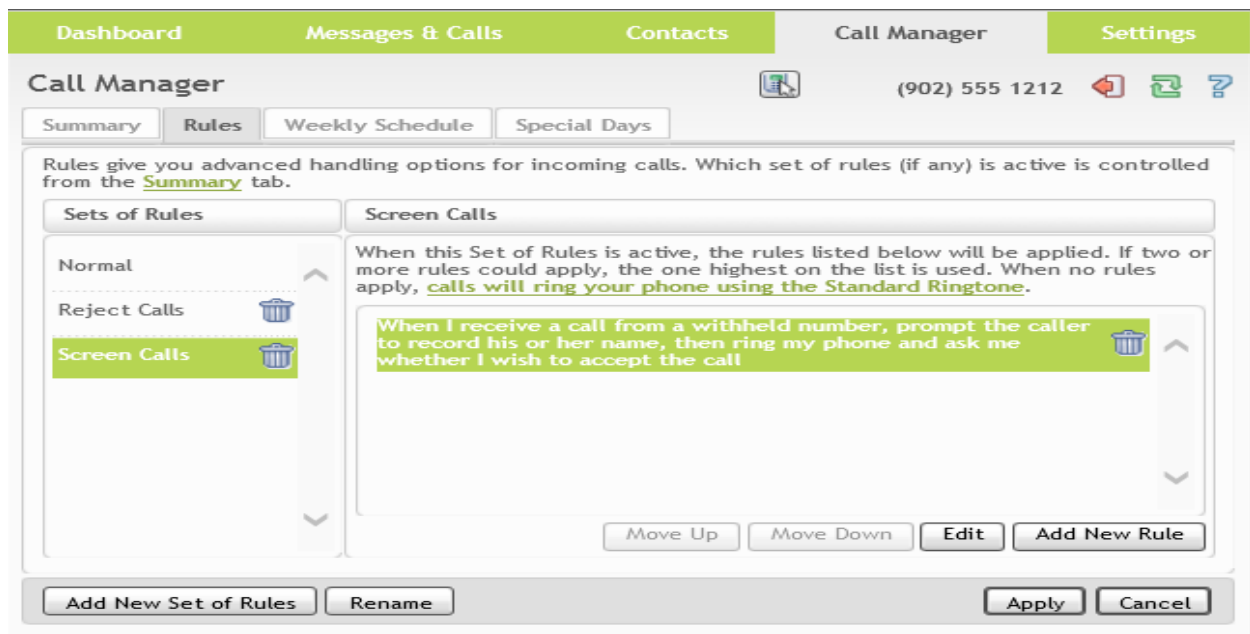If you make any changes to these options, you must select "Apply"

Rules

This page will allow you to set up your call conditions

To get started, select the green line that states "Get started …"

This is your standard rules page to get started on

The standard rules comes for Normal activity (usually what you want through the day); Rejected calls & screened calls.

To start, select the normal rule and then select (on the right) the line that says 'calls will ring ..)
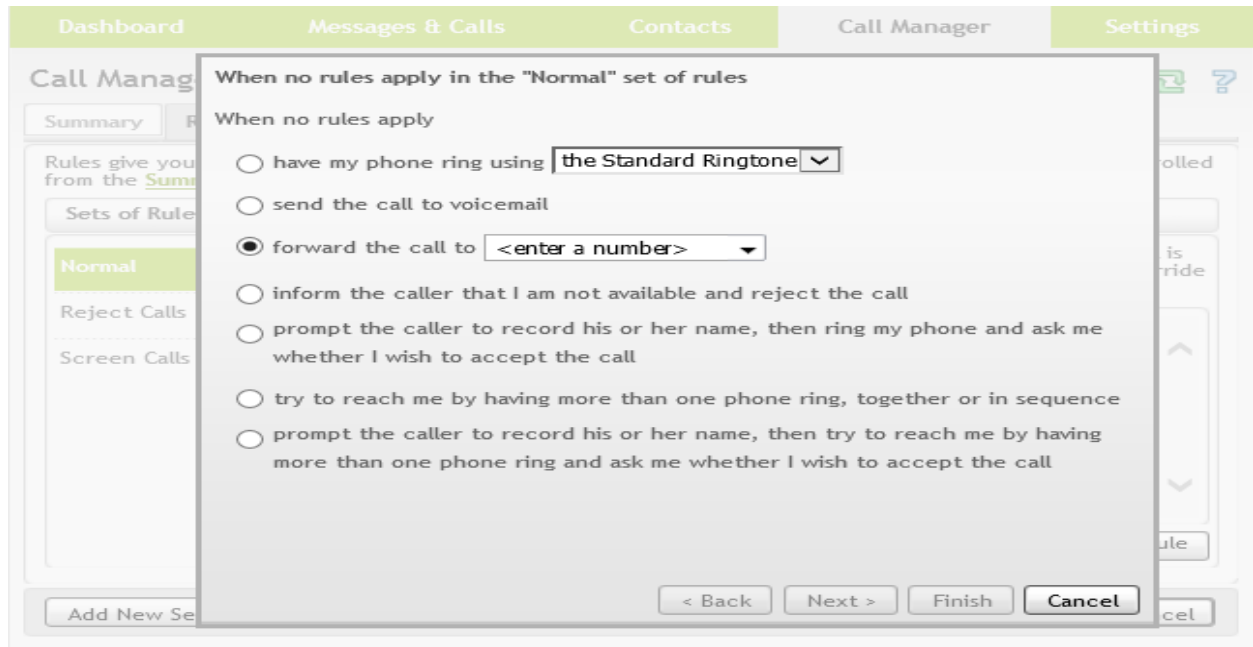
Decide how you want your calls to be answered.

-do you want your calls to go directly to your vm ?

-do you want your calls forwarded to a number (always enter area code)?

-do you want the caller to be rejected?

-do you want your caller to be rejected?

*-do you want the calls to ring at more than 1 location at a time (find me follow me)?

      -select the radial button (try to reach me...)

      -select next

*This is the option most commonly used

-select from the drop down "my phone"

--select "Add"

-add the telephone number you also want to ring when a call come in

-select "Add"

-Adjust the arrows for the time you want the ringing to start
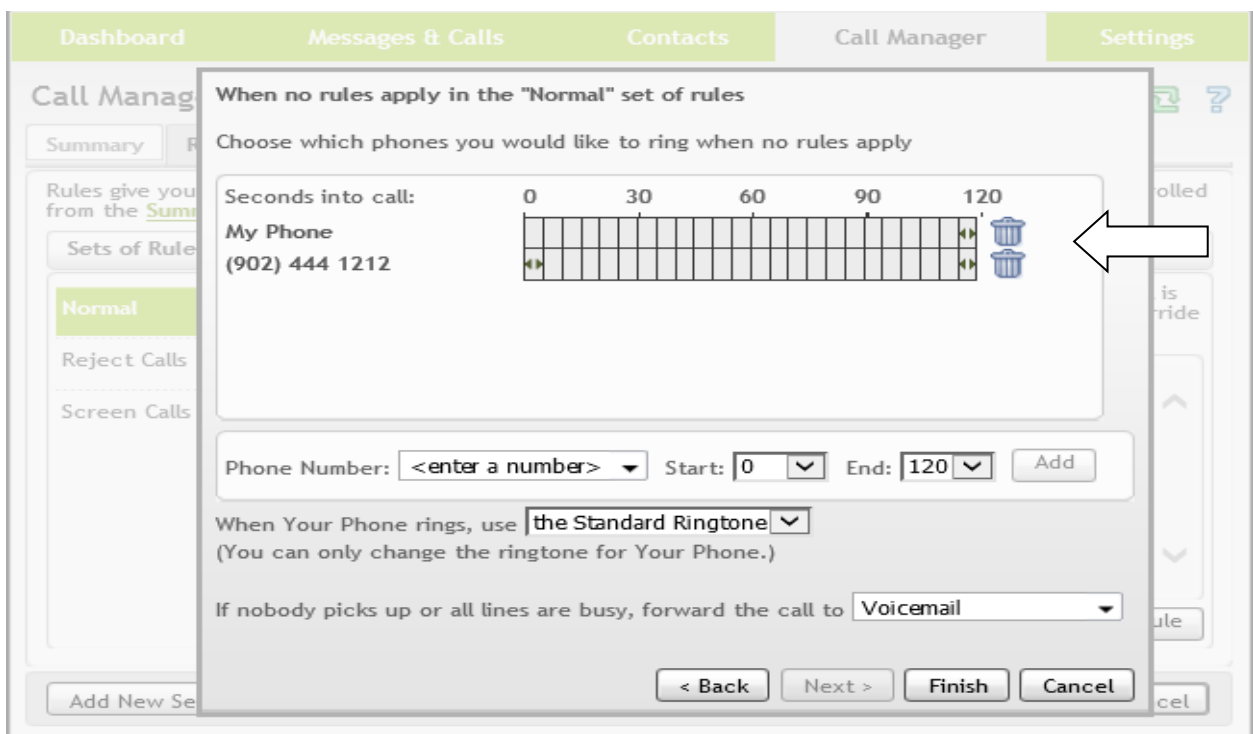
-This set up will have my phone ringing for 20 seconds before going to voice mail

   -My other telephone # will start ringing after 5 seconds and stop ringing after 25 seconds

Once you have the timers set to what you want, select "Finish"

| Summary | Rules | Weekly Schedule | Special Days |

Rules give you advanced handling options for incoming calls. Which set of rules (if any) is active is controlled from the Summary tab.

Sets of Rules | **After hours**

After hours 🗑 ∧

Normal

This Set of Rules does not contain any rules for specific callers so when it is active, all calls will ring your phone using the Standard Ringtone. T⟵⟶this behavior for specific callers, click the "Add New Rule" button below.

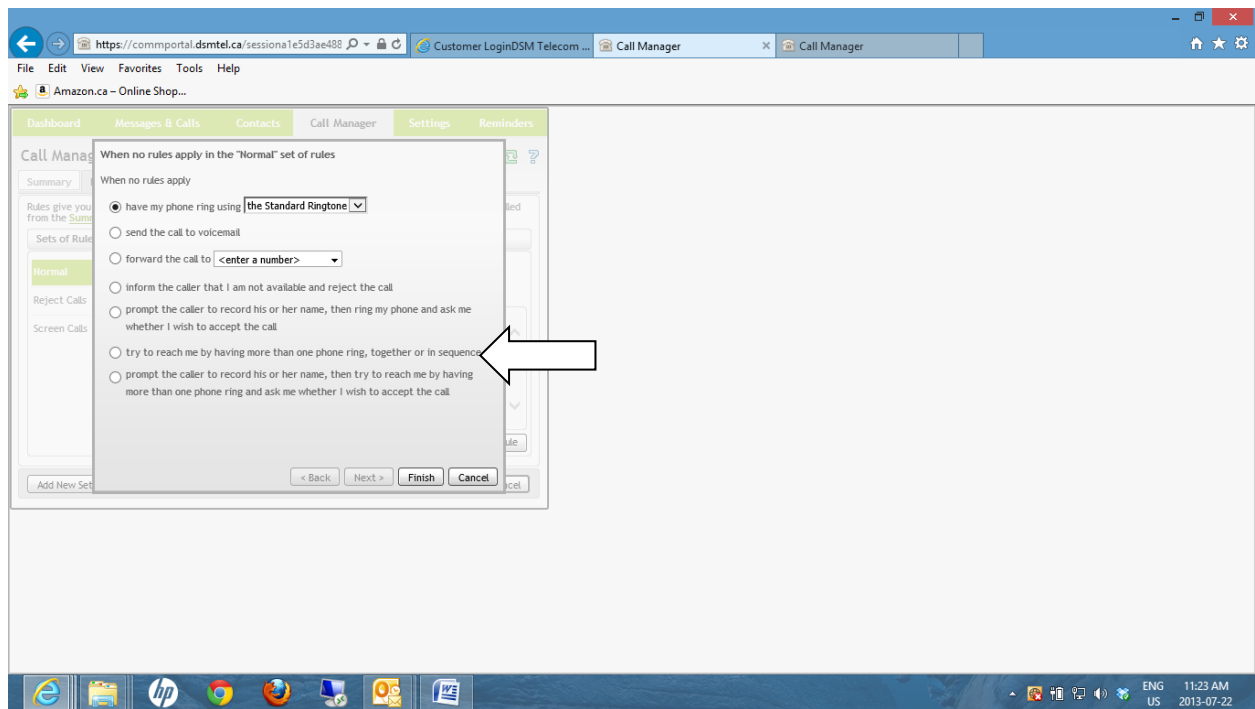Move Up | Move Down | Edit | **Add New Rule**

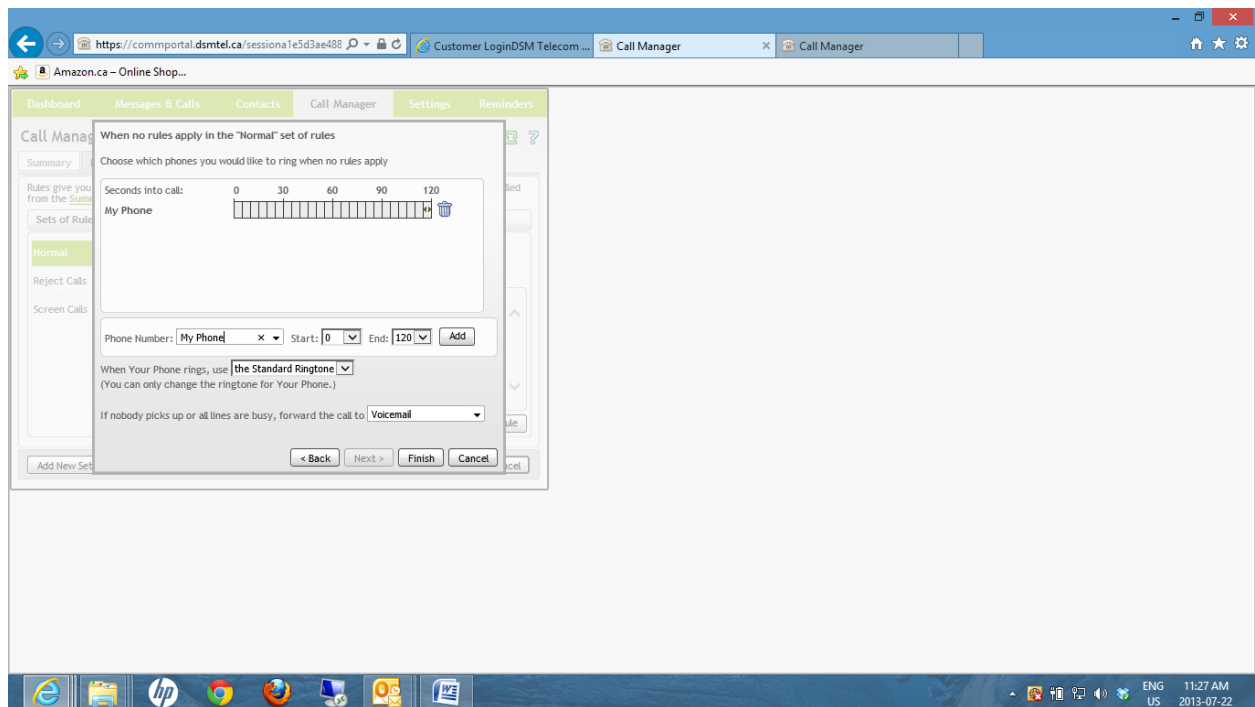Add New Set of Rules | Rename | Apply | Cancel

-Select the Rule, then the line that says "calls will ring your phone using the standard ring tone"

-Select the option try <u>to reach me by having more than one phone ring, together or in sequence</u>

-Select <u>Next</u>

-Select in the drop down box "My Phone"

-Adjust the time you want the calls to ring (before vm will pick it up) by sliding the arrows

-Go back to the phone number tab and enter the other phone number you want the calls to ring at (10 digits), again adjust the time and select "Add"

-If there are no other phones to ring, select "Finish"

-On main rules page, select "Apply"

After you do this, you have set up the rule. The rule is not active yet. You will still need to go to the summary page and activate the rule

-Select "Apply advanced rules"; select "Apply"

<u>Settings Tab</u>

Security

To change your password, enter the new password twice & select "Change password"

Preferences

This page is telling you how you phone is forwarded.

It will also tell you how long your call will ring before it goes to voice mail (do not change this option from the original setting of "0" if you have set up find me follow me or if you have any additional line appearances on your phone.

If you want to use your CommPortal to dial out from and want the caller to see your caller id from your line; select the "Click to dial" and "Use my subscribers line". If you want the caller id to show another number, select "use remote telephone number" and enter the telephone #

If you want to with hold the caller id from a particular call you are making, select "withhold my caller id"

Messaging (Settings)

To set up voice mail to email

-select the box beside "auto-forward all …"

-enter the full email address to send the notification to

-Select the second box only if you want the messages left in your mailbox as well as getting the email

-select apply

Messaging (Mailbox)

This will allow you to select how your messages will be displayed to you

-Skip pin will allow you to enter your mailbox without entering a password

-Fast log in will allow you to enter your password and be delivered your messages (recommended)

-Auto-play voicemail will give you all your messages one after the other with no break to deal with each one

-Voicemail playback(message only) will allow you to hear the messages without a message header on every message

-Message play order will allow you to select if you hear oldest messages first or newest message first
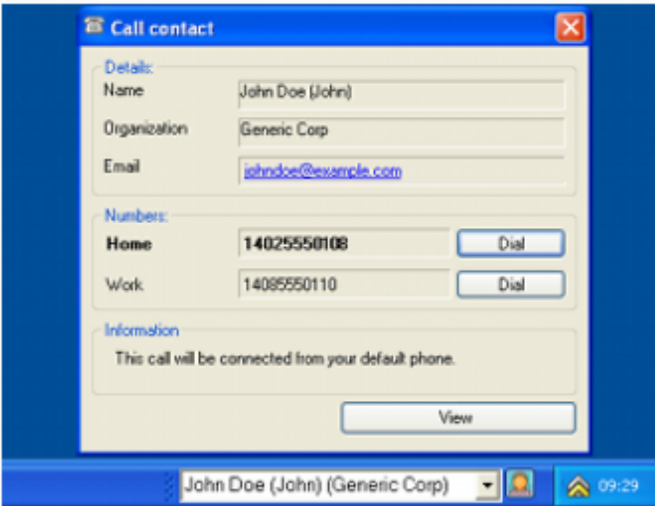
-select "Save settings"

Messaging (Greetings)

This page will show you what greeting is current (only if it has been recorded) and what greetings are available to you to record

CommPortal Assistant

CommPortal assistant will allow you to have the icon on your taskbar (not Windows 8) so you do not have to log into CommPortal any time you want to make a change. Just follow the instructions on this page