

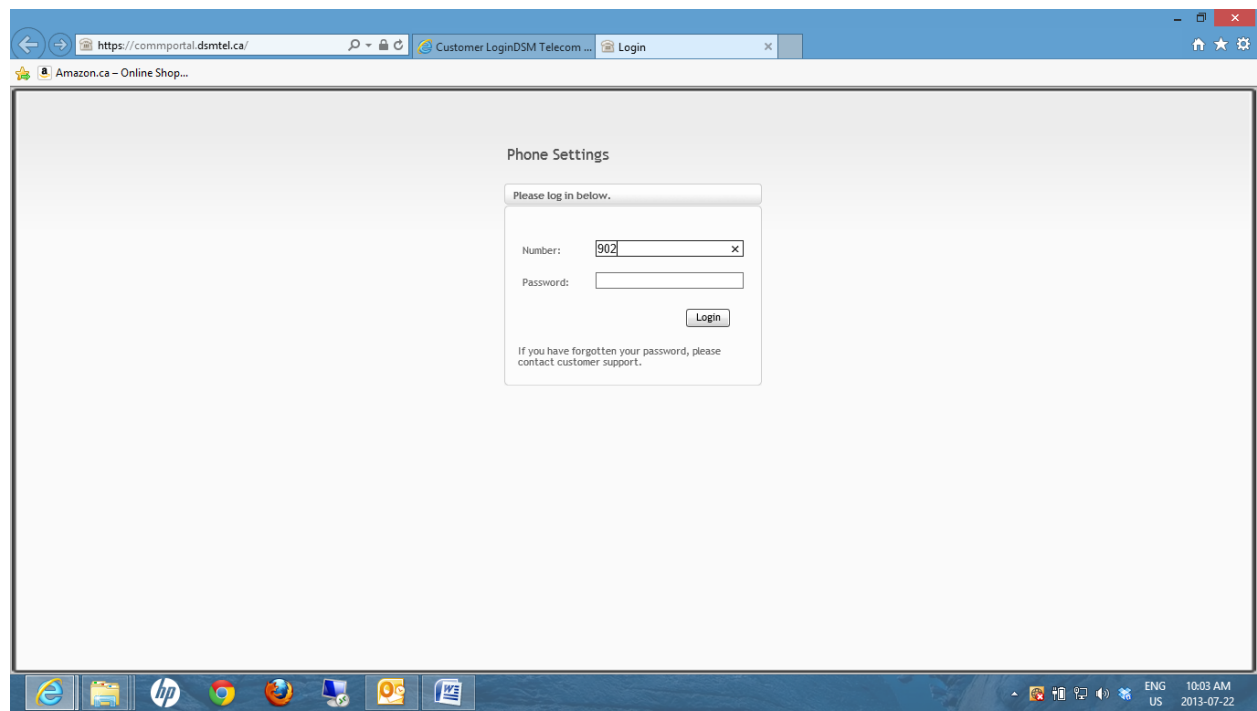


DSM CommPortal Training Guide

-Go To DSMTEL.COM

-select "Customer Login"

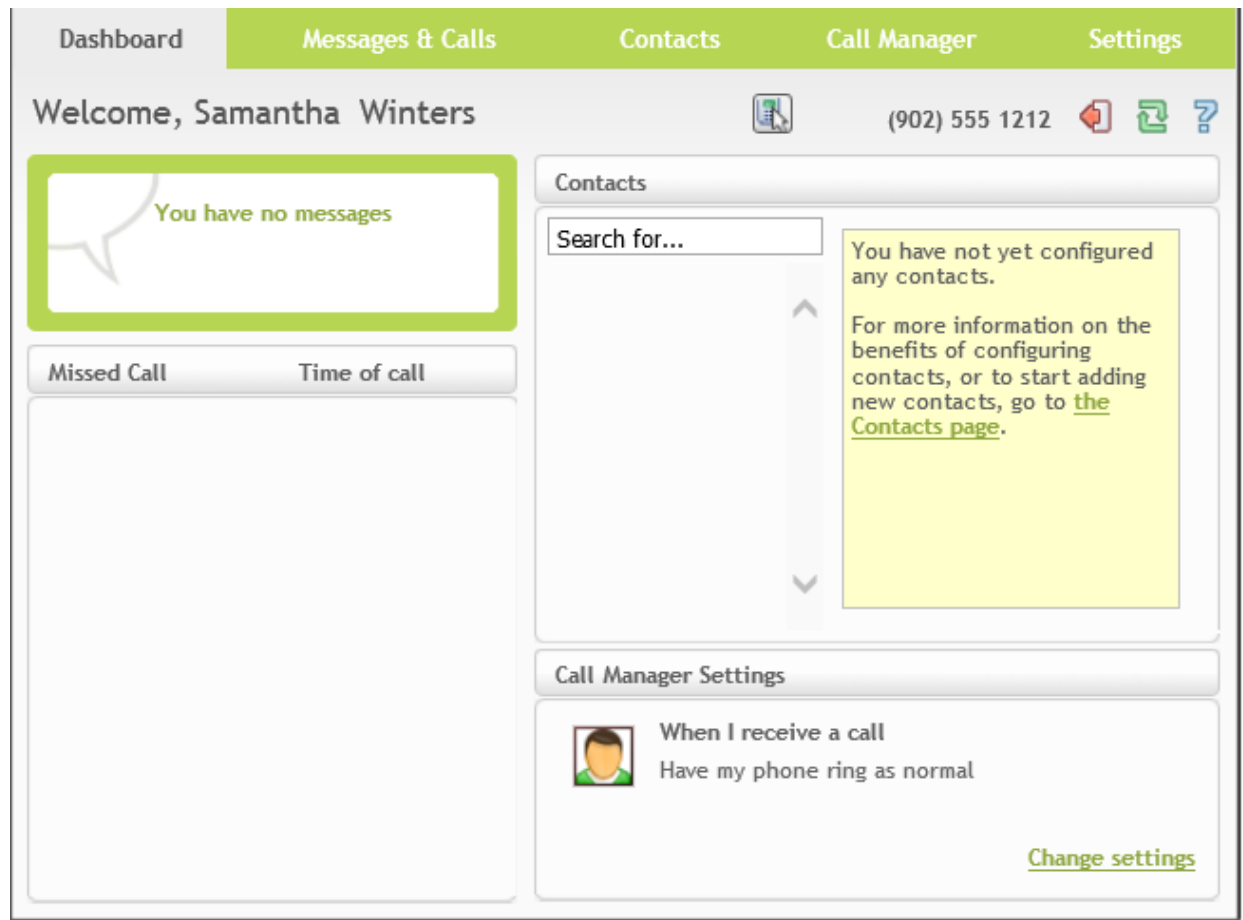
-select "Individual Login"



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

-enter your password (2015 is the default password)

-select "Login"



Dashboard

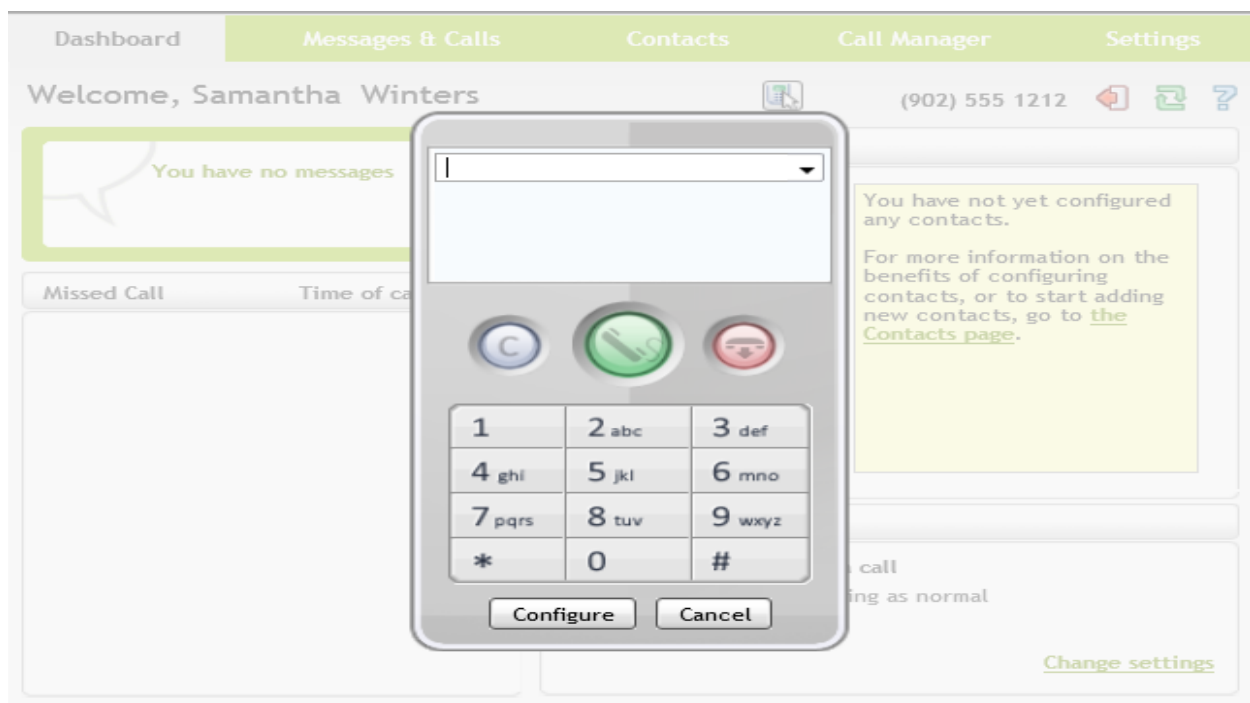
This will give you a quick snap shot of your mail box and how it has been set up

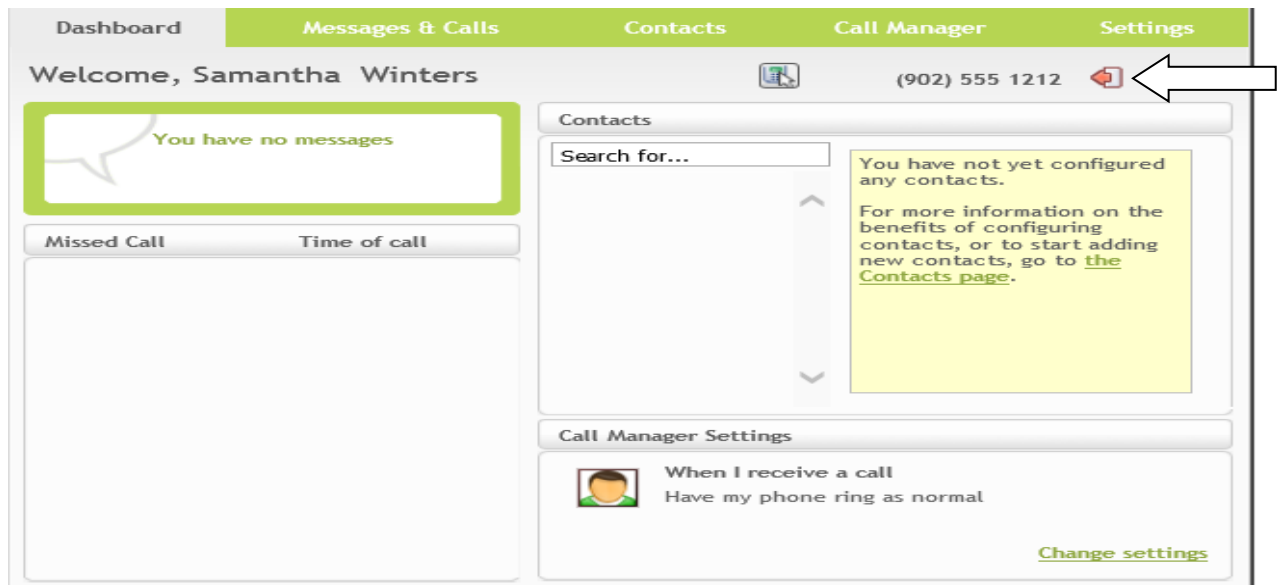
It will tell you:

- 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

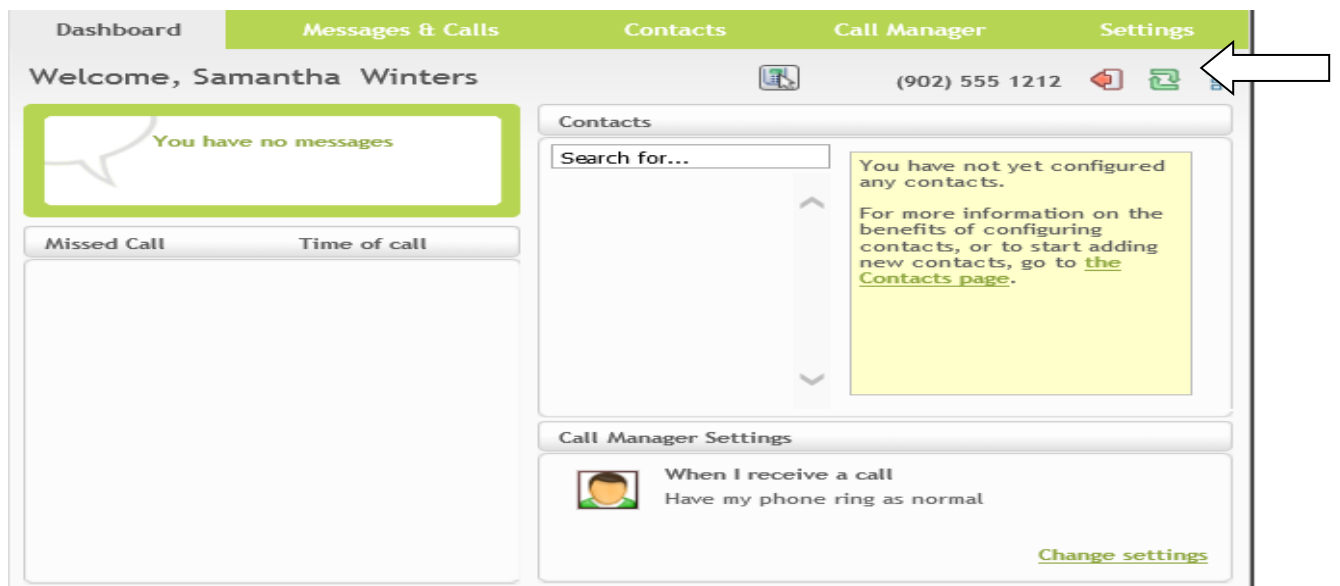


-The small key pad will allow you to dial out from the CommPortal if you are somewhere and want to have your call dial out from your office phone

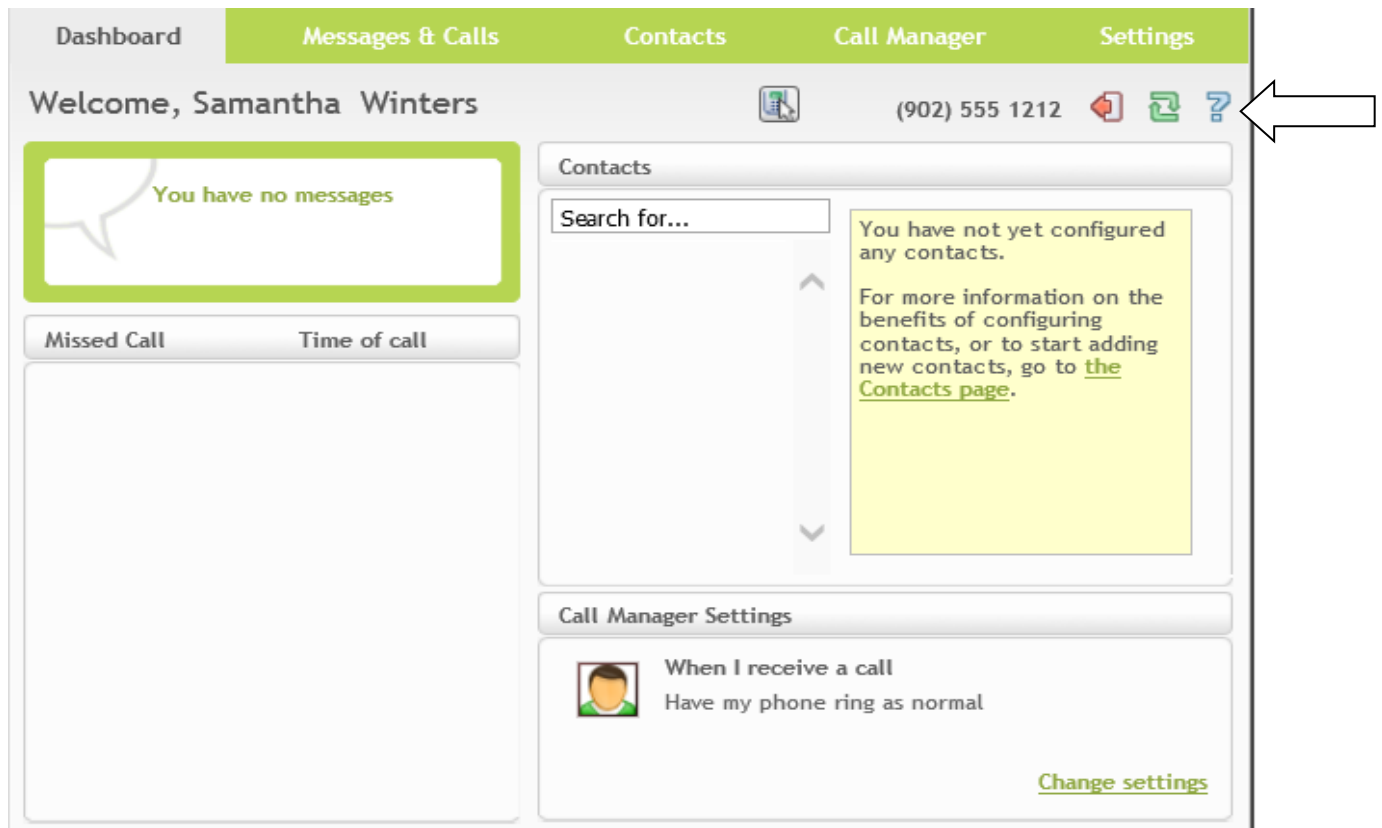




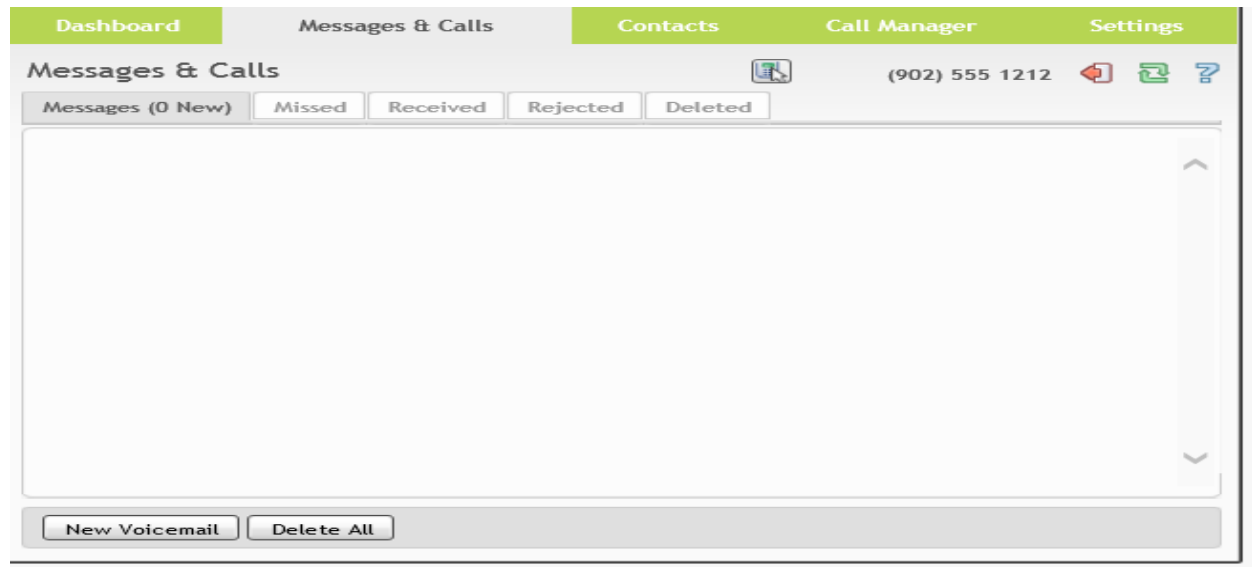
-the red arrow is your log out button



-the square of arrows is the refresh button



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



Messages & Calls tab

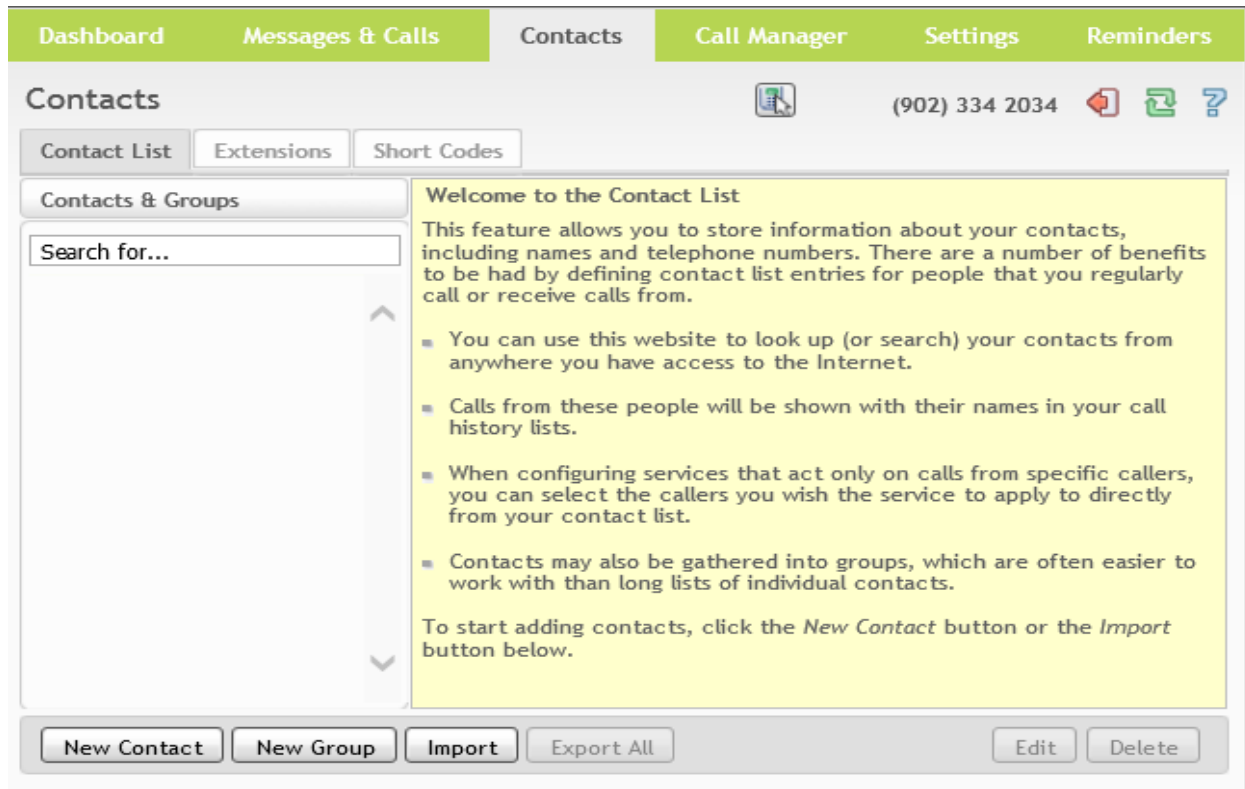
It will tell you:

- 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

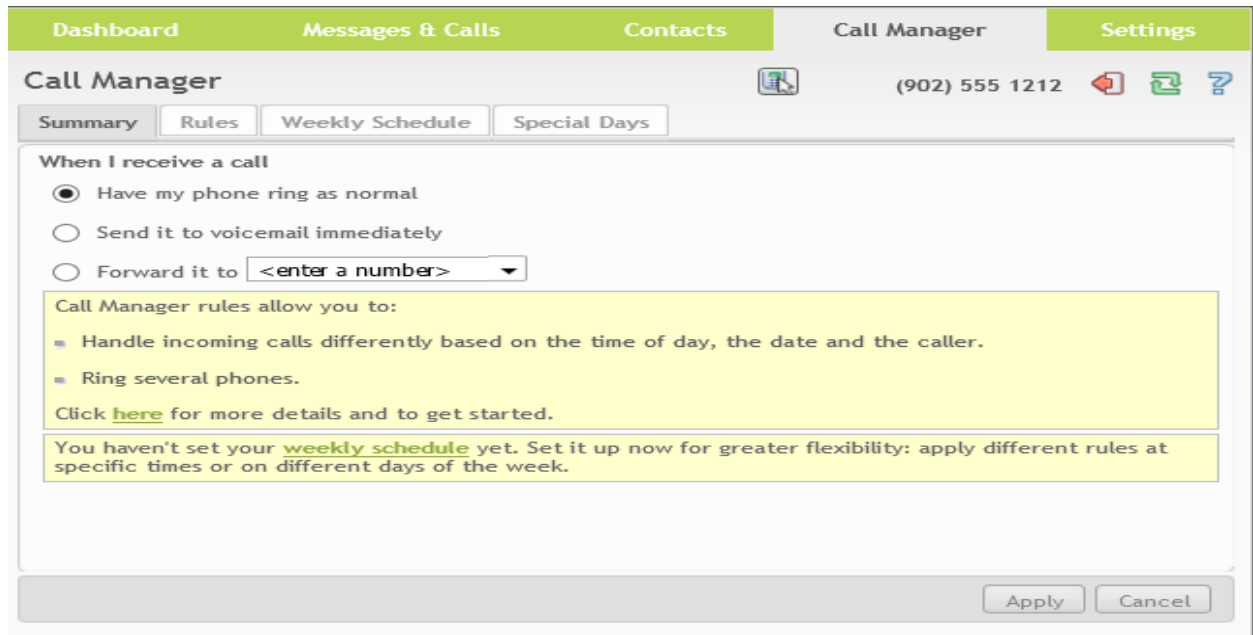
The extensions tab will list all extensions that are within your customer group

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



The screenshot shows a web interface with a top navigation bar containing five tabs: Dashboard, Messages & Calls, Contacts, Call Manager (which is highlighted), and Settings. Below the navigation bar, the 'Call Manager' section is titled, followed by a phone icon and the number '(902) 555 1212'. To the right of the number are three icons: a red arrow pointing left, a green arrow pointing right, and a question mark. Below this, there are four sub-tabs: Summary (highlighted), Rules, Weekly Schedule, and Special Days. The 'Summary' tab contains the following content:

When I receive a call

- ☒ Have my phone ring as normal
- ☐ Send it to voicemail immediately
- ☐ Forward it to:

Call Manager rules allow you to:

- Handle incoming calls differently based on the time of day, the date and the caller.
- Ring several phones.

Click [here](#) for more details and to get started.

You haven't set your **weekly schedule** yet. Set it up now for greater flexibility: apply different rules at specific times or on different days of the week.

At the bottom right of the form are two buttons: 'Apply' and 'Cancel'.

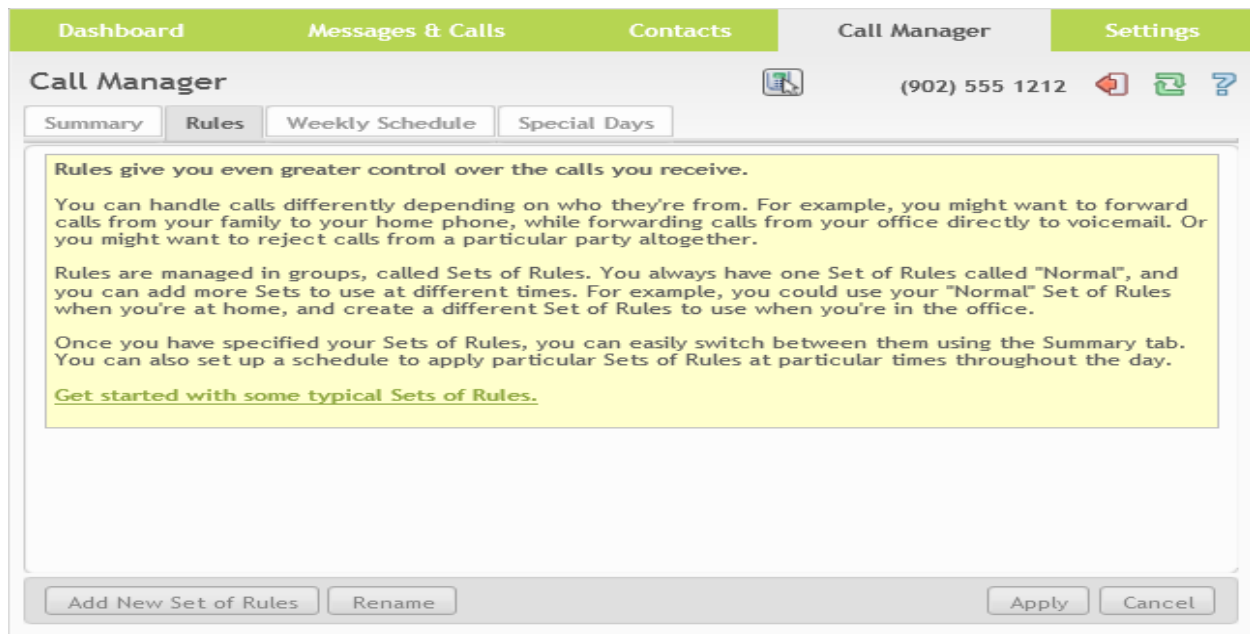
This page will allow you to set up one of the following:

- 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 dashes)..

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

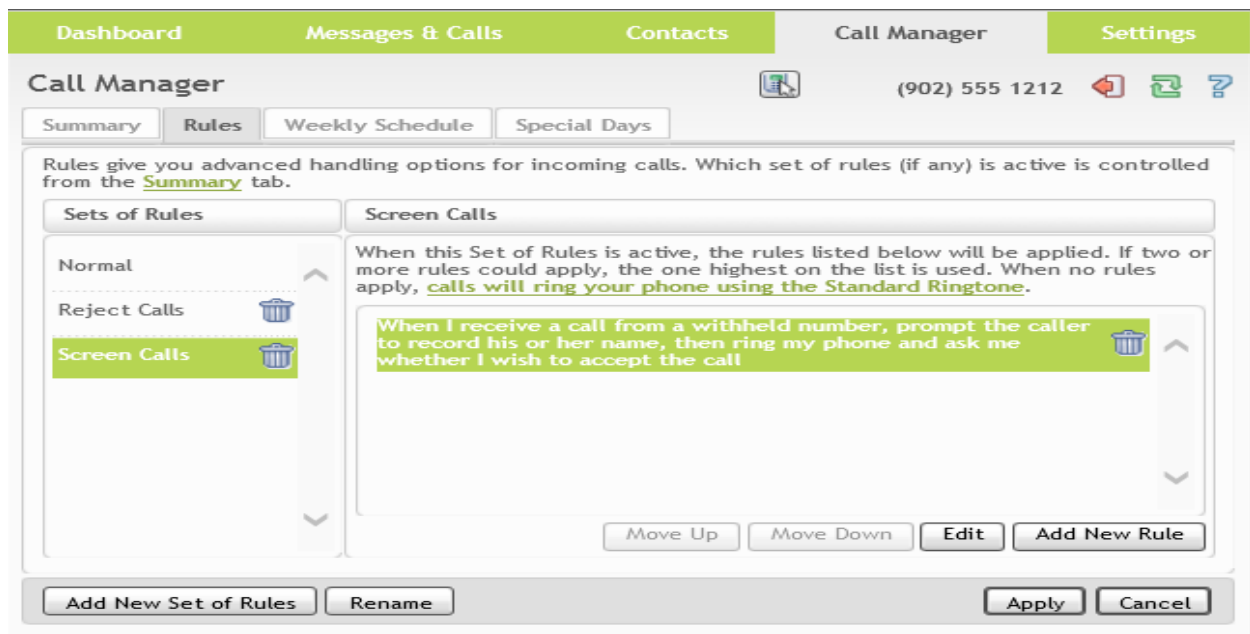
Rules

This page will allow you to set up your call conditions



The screenshot shows the 'Call Manager' interface with tabs for Dashboard, Messages & Calls, Contacts, Call Manager, and Settings. The 'Call Manager' tab is active, and the 'Rules' sub-tab is selected. The main content area contains introductory text about rules, explaining that they allow for different call handling based on the caller. It mentions that rules are managed in groups called 'Sets of Rules' and provides an example of forwarding calls from family to a home phone. A green line of text at the bottom of the introductory box says 'Get started with some typical Sets of Rules.' Below the text are buttons for 'Add New Set of Rules', 'Rename', 'Apply', and 'Cancel'.

To get started, select the green line that states “Get started ...”

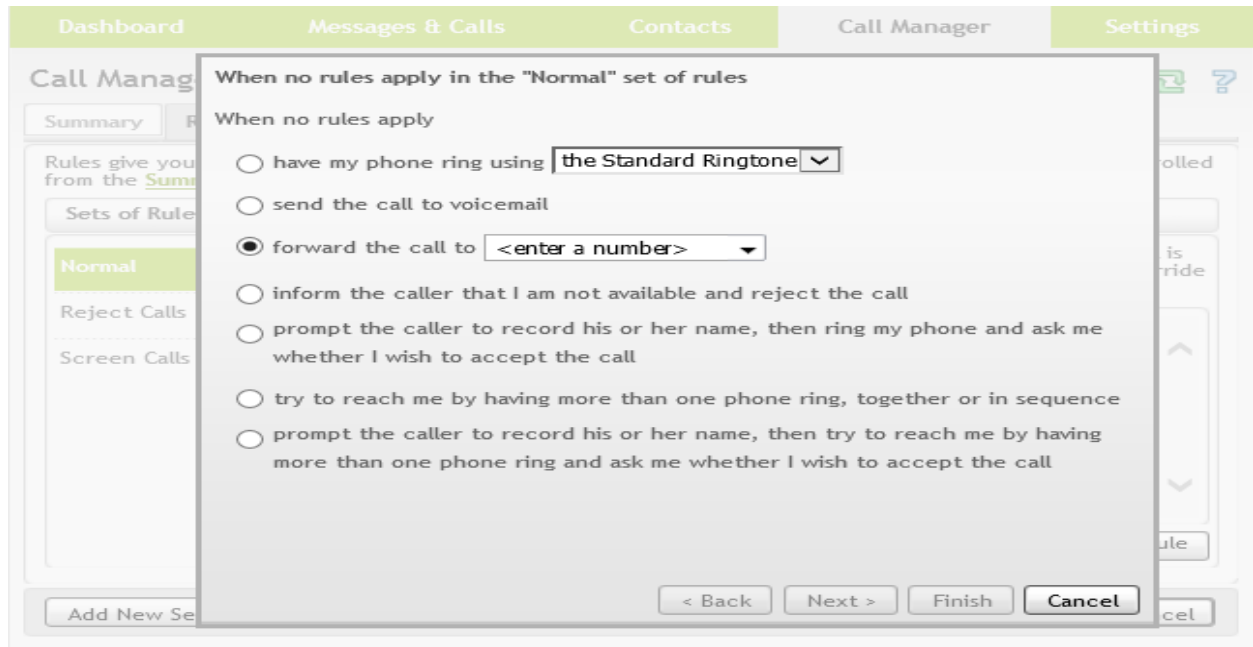


This screenshot shows the 'Call Manager' interface with the 'Rules' sub-tab selected. The 'Sets of Rules' section on the left lists 'Normal' and 'Screen Calls' (highlighted in green). The 'Screen Calls' section on the right explains that when this set of rules is active, the rules listed below will be applied. It includes a green line of text: 'When I receive a call from a withheld number, prompt the caller to record his or her name, then ring my phone and ask me whether I wish to accept the call'. Below this text are buttons for 'Move Up', 'Move Down', 'Edit', and 'Add New Rule'. At the bottom are buttons for 'Add New Set of Rules', 'Rename', 'Apply', and 'Cancel'.

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

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

Call Manager

Summary Rules give you from the Summary Sets of Rule

Normal

Reject Calls

Screen Calls

When no rules apply in the "Normal" set of rules

Choose which phones you would like to ring when no rules apply

Select which phone will ring, when it will begin ringing & for how long.

The first phone always starts ringing right away. If you want, you can delay when other phones start ringing. For example, you might want your office phone to start ringing only once your home phone has already rung for 30 seconds. If a line is busy, the next available phone will start ringing straight away.

In addition to deciding when each phone starts ringing, you can decide how long it rings for. You can also have more than one phone ring simultaneously. All

Phone Number: <enter a number> Start: 0 End: 120 Add

When Your Phone rings, use the Standard Ringtone (You can only change the ringtone for Your Phone.)

If nobody picks up or all lines are busy, forward the call to Voicemail

< Back Next > Finish Cancel

--select from the drop down "my phone"

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

Call Manager

Summary Rules give you from the Summary Sets of Rule

Normal

Reject Calls

Screen Calls

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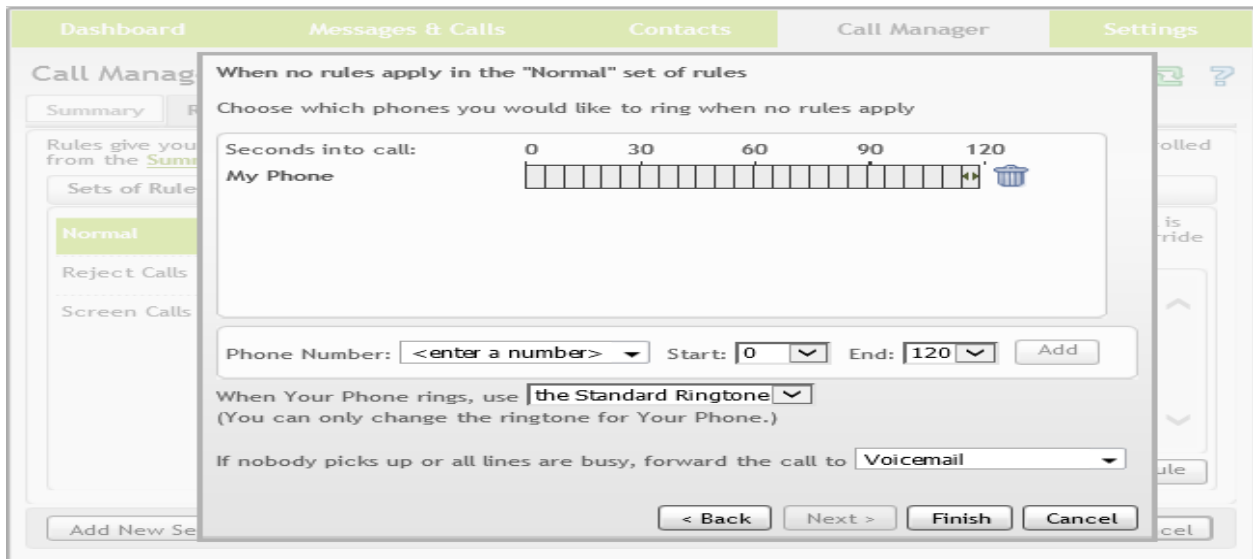
Phone Number: My Phone x Start: 0 End: 120 Add

When Your Phone rings, use the Standard Ringtone (You can only change the ringtone for Your Phone.)

If nobody picks up or all lines are busy, forward the call to Voicemail

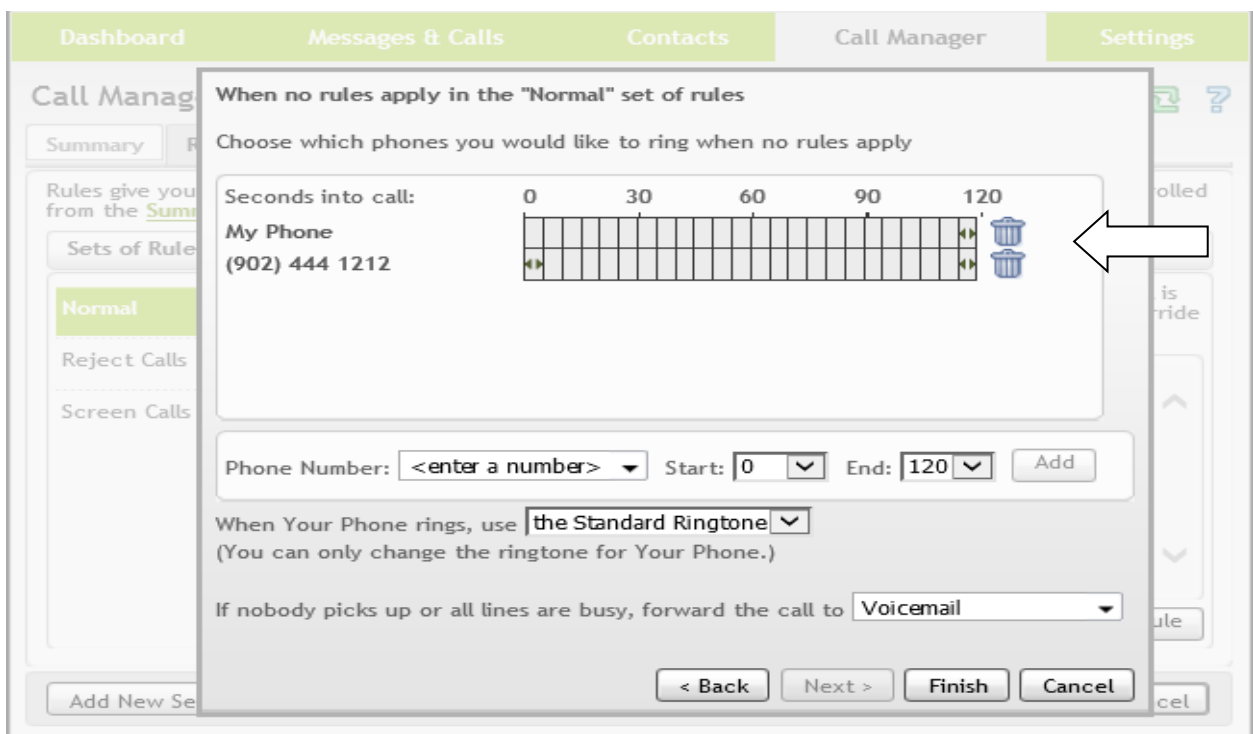
< Back Next > Finish Cancel

--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

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

Call Manager

Summary Rules Sets of Rules

Rules give you control over how calls are handled from the Summary page.

Normal

Reject Calls

Screen Calls

When no rules apply in the "Normal" set of rules

Choose which phones you would like to ring when no rules apply

Seconds into call: 0 30 60 90 120

My Phone (902) 444 1212

Phone Number: Start: End:

When Your Phone rings, use

(You can only change the ringtone for Your Phone.)

If nobody picks up or all lines are busy, forward the call to

-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"

SummaryRulesWeekly ScheduleSpecial 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

Normal

After hours

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**. To change this behavior for specific callers, click the "Add New Rule" button below.

Move Up

Move Down

Edit

Add New Rule

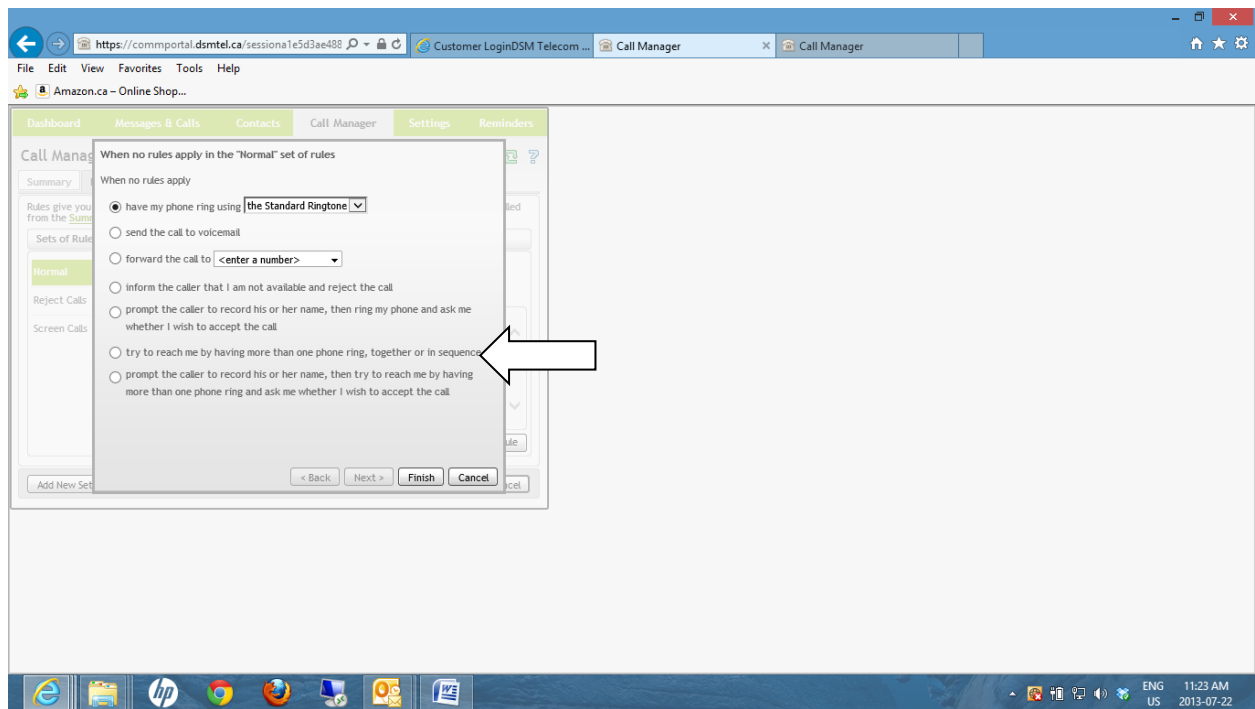
Add New Set of Rules

Rename

Apply

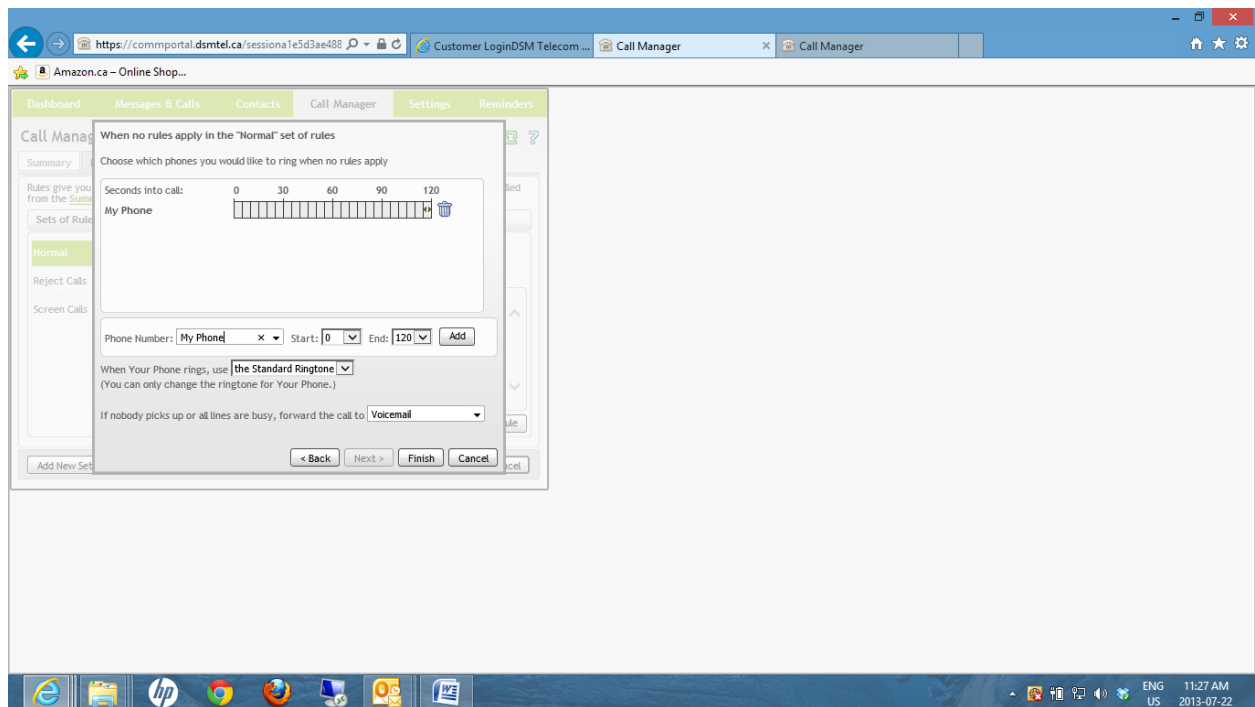
Cancel

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



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

-Select Next



- 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

Call Manager (902) 555 1212

Summary Rules Weekly Schedule Special Days

When I receive a call

- ☐ Have my phone ring as normal
- ☐ Send it to voicemail immediately
- ☐ Forward it to <enter a number>
- ☒ Apply advanced rules. Use my **Normal** rules (or [set up new rules](#))
- ☐ Handle the call depending on the day or time

You haven't set your **weekly schedule** yet. Set it up now for greater flexibility: apply different rules at specific times or on different days of the week.

Apply Cancel

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

Settings Tab

Security

Settings (902) 555 1212

Dashboard Messages & Calls Contacts Call Manager Settings

Security Preferences Messaging CommPortal Assistant

Change Password

Password:

Confirm password:|

Change Password

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

Preferences

The screenshot shows the 'Preferences' window of the 'CommPortal Assistant'. The window has four tabs: 'Security', 'Preferences' (which is selected), 'Messaging', and 'CommPortal Assistant'. The main area is divided into two columns. The left column contains three sections: 'Forwarding Preferences' with three checked checkboxes for 'Immediate Forwarding', 'Busy Forwarding', and 'No Answer Forwarding'; 'Line Information' showing 'Line name: Michelle Hughes', 'Member of Department: None', and 'Admin for Department: Whole Business Group'; and 'Voicemail Preferences' with a field 'Incoming calls are forwarded to voicemail after' set to '16' seconds. The right column contains two sections: 'Click To Dial' with two radio buttons, 'Use my subscriber line' (selected) and 'Use remote telephone' (with an empty text box); and 'Caller ID Preferences' with three checkboxes: 'Withhold my caller ID when making calls' (unchecked), 'Display incoming call name on my phone' (checked), and 'Display incoming call number on my phone' (checked). At the bottom right are 'Apply' and 'Cancel' buttons.

Section	Option	Status
Forwarding Preferences	Immediate Forwarding	Checked
	Busy Forwarding	Checked
	No Answer Forwarding	Checked
Line Information	Line name:	Michelle Hughes
	Member of Department:	None
	Admin for Department:	Whole Business Group
Voicemail Preferences	Incoming calls are forwarded to voicemail after	16 seconds
Click To Dial	Use my subscriber line	Selected
	Use remote telephone	Empty text box
Caller ID Preferences	Withhold my caller ID when making calls	Unchecked
	Display incoming call name on my phone	Checked
	Display incoming call number on my phone	Checked

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)

Security | Preferences | **Messaging** | CommPortal Assistant

Settings | Mailbox | MWI | Email | Outdial | Override | Greetings

Voicemail Auto-Forwarding

☒ Auto-forward all voicemail messages as emails to:
mhughes@dsmtel.com

☐ Leave a copy of forwarded voicemail messages in the inbox.

Display Name

This is the name that is displayed in the "From" header on forwarded messages.

First Name: Michelle
Last Name: Hughes

Apply Cancel

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)

Security Preferences **Messaging** CommPortal Assistant

Settings **Mailbox** MWI Email Outdial Override Greetings

Mailbox Settings

☐ Skip PIN

☒ Fast Login

☐ Auto-Play Voicemail

Voicemail Playback: Message only ▼

Message Play Order Oldest first ▼

Save Settings

Caller Transfer and Numeric Pages

Caller transfer is not available as no operator number has been set for your business group.

Save Settings

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)

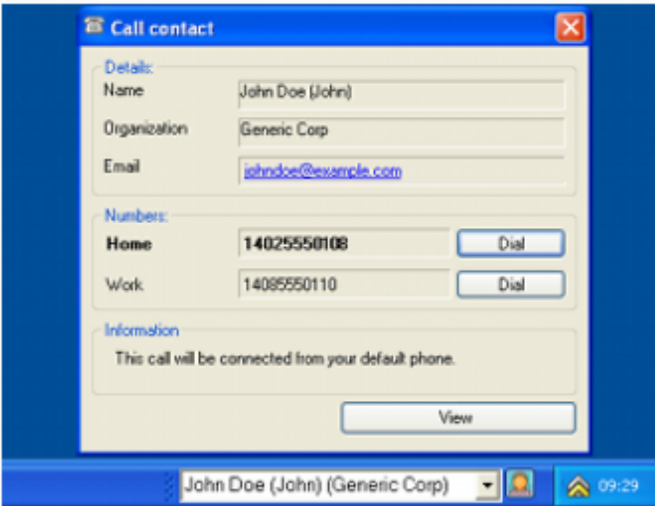
Security	Preferences	Messaging	CommPortal Assistant			
Settings	Mailbox	MWI	Email	Outdial	Override	Greetings
Configure Greeting			Record Greeting			
Select the default greeting: <div>Personal ▼</div>			Select the greeting to record: <div>Business Group Extende ▼</div> Greetings marked with * are already recorded.			

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

Security	Preferences	Messaging	CommPortal Assistant
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Your phone service allows you to access contacts, receive incoming call and voicemail notifications and configure call services from a desktop toolbar.



Platform Requirements:

- Windows XP SP2 or above, Windows Vista or Windows 7
- Internet Explorer 6.0 or above or Firefox 3.0 or above
- at least 8 MB of disk space for installation.

Follow this link to [download the toolbar installer](#).

If prompted, select "Run" to immediately begin the installation or wait for the download to complete and then execute the installer manually at a later time.

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