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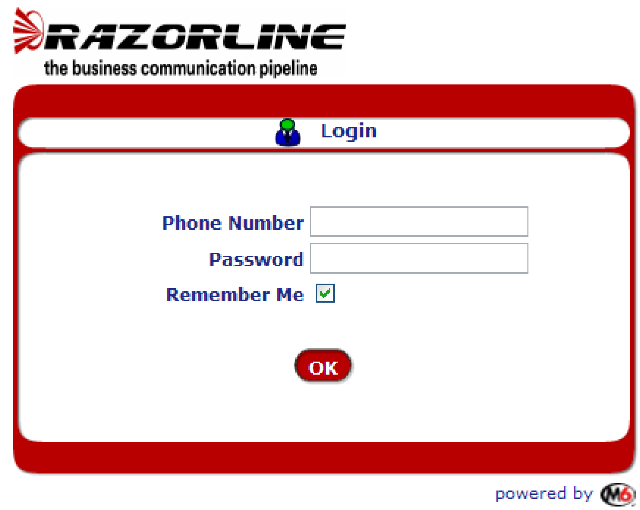
Razorline Web Portal Manual



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Customer Service/Technical Support

Please call 877-733-1700 or e-mail us at support@razorline.com
Razorline customer/technical support is available 24/7.

Important Razorline Numbers and Web Addresses

Razorline Main Number: 504-274-1700

Razorline Website: http://www.razorline.com

Web Portal Address: http://webportal.razorline.com

Technical Support Email: support@razorline.com

Technical Support Line: 877-733-1700

Notes

Options

Changing Your Web Portal Password

1. Click the Options tab.
2. Click the Password tab.
3. Enter your current and new passwords in the corresponding fields.
4. Click Submit.

Installing the TAPI Module

The TAPI module enables you to use click-to-dial from within many TAPI-compliant personal information managers such as Microsoft Outlook. To download the TAPI module:

1. Click the Options tab.
2. Click the PC Integration tab.
3. Click Install TAPI Service Provider.
4. Save the program to a destination on your computer.

Please note: Once installed, you will need to configure the module with the appropriate IP address, telephone number and password. Contact Razorline Support if you need further information.

Voice Assistant

The Voice Assistant provides real-time call control capabilities from the Web Portal. Note that Voice Assistant requires your web browser application to support ActiveX Controls.

To **Launch Voice Assistant Through Web Portal:**

1. Click the Call Control button located at the top right of most of Web Portal. 
2. A pop-up will appear.
3. From here you can manage incoming and active calls.

Logging Into the Web Portal

1. Open your web browser application.
2. In the address field, enter http://webportal.razorline.com
3. In the phone number field, enter your complete DID.
   *If your phone number is configured as an extension-only phone (i.e. you have no DID), enter your company's complete main telephone number followed by "x" and your extension number.
4. In the Password field, enter your password.
5. To have your computer automatically log you in, check the "Remember Me" box.
6. Click OK.

Please note: Internet Explorer 8 has a compatibility issue with web portal. If you do not see the Razorline logo when entering the web portal address, you will need to click the "Compatibility View" button to allow IE8 to view the website correctly. The Compatibility View button can be found to the right of the address bar. (The button looks like a piece of paper ripped in half.) Click this button and you will be placed into Compatibility Mode.

Configuring the Web Portal

You may want to configure you web portal for optimal use. You will only need to configure the web portal once, but you can change the configuration at any time.

1. Click the Options tab.
2. Click the Profile tab.
3. Choose which tab should be your default home page.
4. Choose the rows per page. (How many numbers will be listed on one page.) 99 rows is the max.
5. Click the box to launch the Voice Assistant at startup.
6. Click Submit.

Directories

The web portal provides two different contact directories. The Personal Directory enables you to manage and use your own private directory of contacts. The Corporate Directory is managed and provided by Razorline. This displays all of the employees of your organization.

Creating a Personal Contact

1. Click the Directory tab.
2. Click the Personal tab.
3. Click Add.
4. Enter the contact information.
5. Click Save.

Importing Contacts From Your Email Client

1. Click Import.
2. Browse your computer for the saved .CSV (Comma Separated Value) file.
3. Click Import to finalize.

Navigating Contacts

Contacts are listed in tables. Tables may span multiple pages depending upon the number of contacts and the number of rows per table configured in your profile (see Page 3).

To **Search Contacts:**

1. Click on any of the underlined field headings (e.g. Last Name, First Name, Title, Phone Numbers) to sort the contacts by that field. An arrow icon will indicate whether the sort is ascending or descending. To change the sort direction, click the field heading again.

Speed Dials

Depending on the type of phone you have, you may be able to configure the speed dial buttons of your phone using the Web Portal. All phones except the Cisco 7942 models have access to this option.

To **Create a New Speed Dial Button:**

1. Click the Call Management tab.
2. Click the Speed Dials tab.
3. Click Set Speed Dial button.
4. Your phone will go off-hook. Follow the voice prompts to define your new speed dial button.

To **Modify an Existing Speed Dial Button:**

1. Click the Call Management tab.
2. Click the Speed Dials tab.
3. Click the Edit functions icon associated with the Speed Dial button you wish to modify.
4. Enter the new information for the speed dial.

To **Delete an Existing Speed Dial Button:**

1. Click the Call Management tab.
2. Click the Speed Dials tab.
3. Click the Delete functions icon associated with the Speed Dial button you wish to delete.

Call Treatments

Call Treatments allow you to specify how inbound calls are treated. You can define a default call treatment tat handles all inbound calls. You can also define custom call treatments for specific callers to handle these calls in a different manner than the default. For example, you might configure your default treatment to route calls normally during the day and to use Find-Me in the evening. Calls from your most important customers however, will be forwarded to your cell phone for personal handling at any time of the day.

To **Define the Default Call Treatment:**

1. Click the Call Management tab.
2. Click the Call Treatment tab.
3. Choose whether to Disable, Forward to Number or Forward When Busy/No Answer.
4. Enter the desired telephone number to forward to.

To **Configure Advanced Call Treatment:**

1. Click Advanced.
2. You can define special call treatments for up to three different time periods using Time of Day Action 1, Time of Day Action 2 and Time of Day Action 3.
3. Select the option you would like to apply.

To **Define a Custom Call Screening Treatment :**

Use this for treatment of an individual number.

1. Click the Call Management tab.
2. Click the Call Treatment tab.
3. Click Add.
4. Enter the desired name and number.
5. Configure the action you would like to apply to that specific caller.

Modifying a Personal Contact

1. Click the Directory tab.
2. Click the Personal tab.
3. Navigate to the desired contact.
4. Click the Edit function icon for the contact.
5. Change the desired contact information.
6. Click Save.

Corporate Contacts

Corporate contacts cannot be edited by the end-user. If there is a mistake on a name or extension, please contact Razorline about the issue.

Click-to-Dial a Contact

You can click-to-dial any telephone number associated with a personal or corporate contact.

1. Click the Directory tab.
2. Navigate to the desired contact.
3. Click the appropriate telephone number (e.g. office, home, cell, etc.). Your phone will then go on speaker phone and dial the number clicked.

Conferencing in a Contact

You can create a conference call by adding one or more parties to an existing call. (Sometimes referred to as "3-Way Dialing".)

1. Click the Directory tab.
2. Navigate to the desired contact.
3. Click the Conference In icon.

Voicemail

Managing Messages

1. Click the Voice Mail tab.
2. Click either the Inbox tab or Saved tab depending on which messages you wish to hear.
3. Navigate to the desired message.
4. To hear the message through your phone, click 
5. To forward the message, click 
6. To forward the message to an email, click 
7. To delete a message, click the checkbox and click Delete.
8. To save a message, click the checkbox and click Move to Saved.

Configuring Voicemail Options

Voicemail options allow you to change whether you want your voicemails forwarded to your email or apply a Custom Operator.

To **Configure Voicemail to Email**

1. Click the Voice Mail tab.
2. Click the Options tab.
3. Click Enable Email Forwarding.
4. Enter the desired email to forward the voicemail.

Please note: Voicemails will be sent to your email as a .wav attachment.

To **Configure the Custom Operator**

The Custom Operator allows you to give the caller an option to be forwarded to another number when they press 0. It can be an internal number or an external number.

1. In the Custom Operator box, enter the desired number to be reached.

Please note: In your voicemail greeting, be sure to give the caller instructions to press 0 to reach the desired number.

Exporting Call Log Entries

You can export your call logs into a Comma Separated Value (CSV) file format that can be used by many spreadsheet applications.

To **Export Call Log Entries:**

1. Click the Call Management tab.
2. Click the Logs tab.
3. Click Export to CSV File.
4. In the File Download dialog, click Save, select a destination folder, enter a filename and click Save.

Find-Me

Find-Me enables your callers to locate you at a predefined group of numbers when you are away from your phone. Find-Me is a Ring No Answer condition that occurs when you fail to answer an inbound call at your business telephone. You can define one or more Find-Me profiles for use by different callers or at different times of the day.

To **Define a Find-Me Profile:**

1. Click the Call Management tab.
2. Click the Find-Me tab.
3. Click Add.
4. Select the desired information for the Find-Me profile.

To **Manage a Meet-Me Conference Using the Phone:**

1. To Mute/Unmute All Participants, dial *5.
2. To Lock/Unlock the Conference, dial *4. when a conference is locked, no new will be allowed to enter the call.
3. To Disconnect All Participants and End the call, dial *7. All participants will be disconnected from the conference. If the moderator subsequently rejoins the call, participants will be able to rejoin the call as well.
4. To Add Additional Ports to the conference, dial *3.
5. To Extend the conference by 15 minutes, dial *6.
6. To Play the Roll Call, dial *2. All recorded names will be recited.

To **Manage a Meet-Me Conference Using Web Portal:**

1. Click the Moderate Conference  button.
2. A moderator box will pop up.
3. Enter the Moderator ID.
4. From here, you can control the conference.

Call Management

Accessing Call Logs

Call Logs provide a historical record of recent inbound, outbound and missed calls. Only the past 100 records will be shown. This is automatically refreshed for each new call received, placed or missed.

1. Click the Call Management tab.
2. Click the Logs tab.

Navigating Call Log Entries

Call Logs are listed in tables. Tables may span several pages depending on the number of rows per table configured in your profile. (See page 3.)

Managing Voicemail Distribution Groups

Distribution Groups are used when you want to send messages to a group of internal users. Distribution Groups are managed by the end-user and are only available to that user. A user may have a maximum of 20 different Distribution Groups.

To **Create a New Distribution Group:**

1. Click the Voice Mail tab.
2. Click the Dist. Groups tab.
3. Click Add.
4. Click Change Distribution Group Name if you wish to name the group something specific.
5. Click Save.
6. Click Add Members.
7. Click the Select checkbox associated with each person you would like to add to the group.
8. Click Save.

To **Edit an Existing Distribution Group:**

1. Click the Voice Mail tab.
2. Click the Dist. Groups tab.
3. Click the Edit function icon associated with the group you wish to modify.
4. Click the Change Distribution Group Name if you wish to edit the name of the group and click Save.
5. To add new members to the group, click Add Members and select each new contact you wish to add and click Save.
6. To delete members, select each contact you wish to delete and click Delete.

Changing Your Voicemail Password

1. Click the Voice Mail tab.
2. Click the Password tab.
3. Enter your current password and new password in the specified fields.

Conferencing

Please note: Not all users have the authority to make or edit conferences.

Meet-Me Conferencing allows you to schedule a conference call and have callers join the call by dialing into the conference bridge. Each Meet-Me Conference is limited to 25 participants.

Managing Meet-Me Conference Reservations

To **Schedule A New Reservation:**

1. Click the Conferencing tab.
2. Click the Meet Me tab.
3. Click Add.
4. In the Subject field, enter a descriptive title or subject.
5. Using the Date drop-down menu, select the Month, Day and Year of your conference.
6. Using the Time drop-down menu, select the start time.
7. Using the Length drop-down menu, select the expected duration.
8. In the Participants field (maximum of 25), enter the number of conference ports you wish to reserve. Each party calling in uses one port. If a conference room phone is to be used, that only requires one port.
9. If the conference will be recurring, click the Recurring checkbox. From there, you can customize your recurring conference.
10. Click Check Availability. If ports are available for the desired date, click Save. Otherwise, click Back & Try Other Date/Time.
11. Keep handy the Moderator ID, Guest ID and the Dial Access Number for internal and external users.
12. You can notify participants by clicking then click Send. An email template will pop up with your default email client. Enter the desired email addresses and send.

To **Modify and Existing Reservation:**

1. Click the Conferencing tab.
2. Click the Meet-Me tab.
3. Navigate to the desired conference reservation.
4. Click the Edit function icon.
5. Change the relevant information.
6. Click Save.

To **Cancel an Existing Reservation:**

1. Click the Conferencing tab.
2. Click the Meet-Me tab.
3. Navigate to the desired conference reservation.
4. Click the Delete button for the relevant reservation. For a recurring conference, click the Delete button to delete a single instance of the meeting. Click the Delete All Related Recurring Conferences to delete all instances of the meeting.

Joining a Meet-Me Conference

1. Dial the Meet-Me Conferencing bridge by dialing the 3-digit internal number or the Conference bridge external number given to you when the conference was made.
2. To enter as the moderator, enter the Moderator ID followed by the # key. Moderators have special privileges.
3. To enter as a guest, enter the Guest ID followed by the # key.

Please note: If you attempt to join the conference more than 5 minutes before the scheduled start time, you will be asked to try again later.

Managing a Meet-Me Conference

Within a Meet-Me Conference, the moderator can manage the call using the keypad on their phone or by using the Meet-Me Conference management panel in the Web Portal.