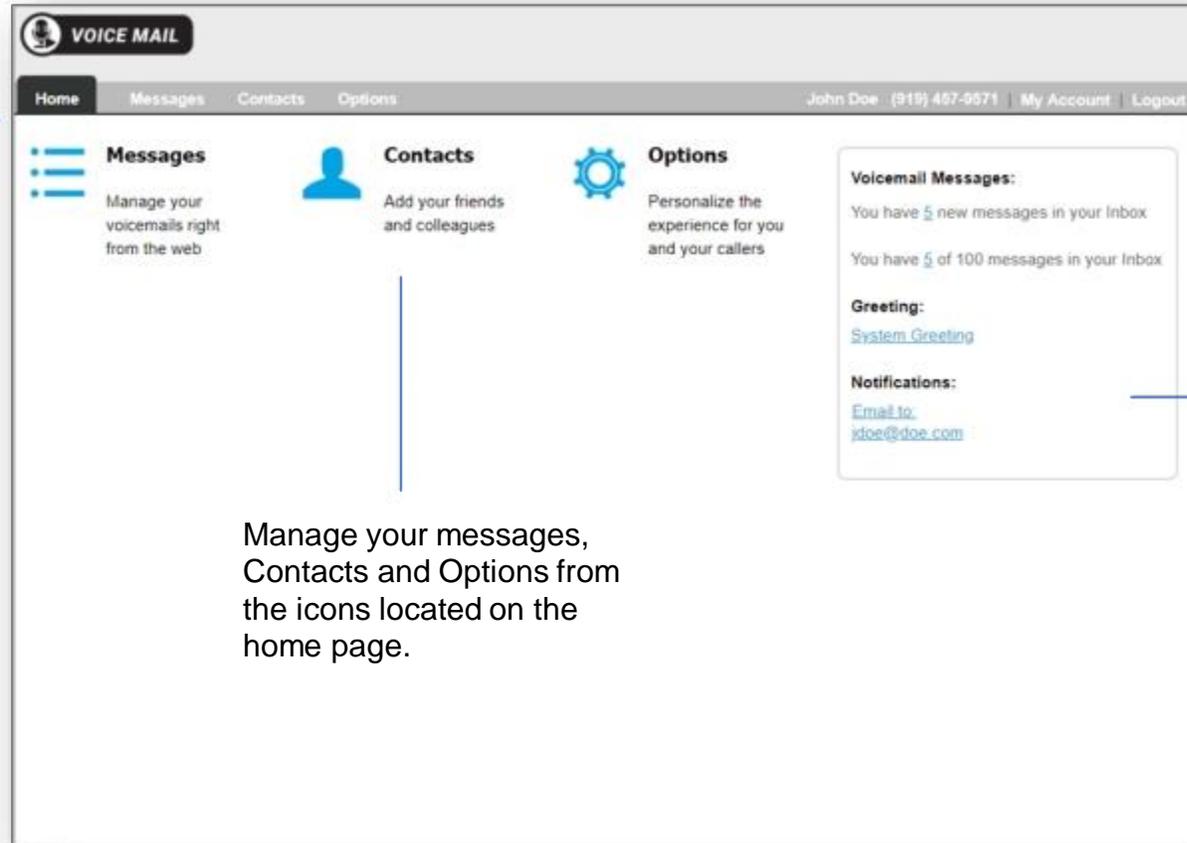


# Quick Reference Guide for Messaging Portal

**RAZORLINE**

From your End User Portal, click on SERVICES / Voice Mail and click on MSG PORTAL

The top navigation tab provides quick access to **Messages, Contacts** and **Options** menus.



Access your Account settings and options by clicking **My Account** option on the top right of the top navigation bar

You can also access **Voicemail Messages, System Greetings** and notifications settings located in the panel located on the right side of the **Home** page

Organizations can use this Quick Reference Guide to manage their Visual Voicemail greetings, contacts and messages.

# Messaging Portal

## Messages

**Messages**  
Manage your voicemails right from the web

Navigate to the **Messages** menu by clicking the **Messages** icon on the home page or by selecting the **Messages** tab on the top navigation bar.

To manage multiple messages, check the box next to the desired message or select the box located at the top of the menu. Next click the **down arrow** on the **Action** tab and select the action of choice.

The screenshot displays a web interface for a 'VOICE MAIL' service. At the top, there are navigation tabs for 'Home', 'Messages', 'Contacts', and 'Options'. The user is identified as 'John Doe (919) 457-9971'. Below the navigation, there are tabs for 'Inbox' and 'Trash', with a note 'Showing 5 messages in your Inbox'. A list of messages is shown, with the first one selected. The selected message is from '(972) 265-3557' and is a '34 sec voice message'. A 'Forward Message' dialog box is open, prompting the user to enter email addresses or account numbers. The dialog includes fields for 'Email', 'Account', and 'Recipients', each with an 'Add' button. There is also a 'Recipients' dropdown menu with a 'Delete' button. The message being forwarded is identified as '34 sec voice message'. At the bottom of the dialog are 'Send' and 'Cancel' buttons. A 'Sort By' dropdown menu is also visible, with options for 'Caller' and 'Date', and buttons for 'Mark as Saved' and 'Mark as New'.

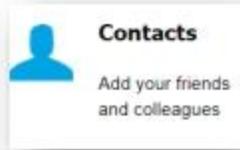
When a message is selected menu options will be presented. Select an option by clicking the box of choice.

**Forwarding:** If selected, a forward message wizard will appear with necessary steps required to forward the message selected

Once all fields are entered, click the **Send** button

# Messaging Portal

## Contacts - Adding a New Contact



Navigate to the **Contacts** page by using the **Contacts** icon located on the Home page or by selecting the **Contacts** tab from the top navigation bar.

Select the **Add Contact** box to add new Contact details.

Type into the **Search Contact** window to search and update an existing contact

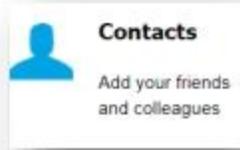
A screenshot of a web application interface for managing contacts. At the top, there is a navigation bar with tabs for "Home", "Messages", "Contacts", and "Options". The "Contacts" tab is selected. To the right of the navigation bar, the user's name "John Doe" and phone number "(919) 457-9571" are displayed, along with links for "My Account" and "Logout". Below the navigation bar, there are two buttons: "Add Contact" and "Search Contacts". The main content area is divided into two columns. The left column has a header "All Contacts" and a sub-header "No Contacts". The right column is titled "New Contact" and contains a form with several input fields: "First name:" (Jane), "Last name:" (Doe), "Nickname:" (empty), "Company:" (Doe's Plumbing), "File as:" (Last, First), and a preview field showing "Doe, Jane". Below these are fields for "Home:", "Business:", "Mobile:", "Business Fax:", and "Home Fax:". At the bottom right of the form are "Save" and "Cancel" buttons. A "Primary Email:" field is located at the very bottom of the page.

Update **New Contact** information in the fields provided.

Select the **Save** button to save your new contact details.

# Messaging Portal

## Contacts - Importing Contacts



Navigate to the **Contacts** page by using the **Contacts** icon located on the Home page or by selecting the **Contacts** tab from the top navigation bar.

Home Messages **Contacts** Options John Doe (919) 457-9571 My Account Logout

Add Contact Search Contacts

All Contacts No Contacts

### Import Address Book

Where is the Comma-Separated Address Book file located?  
Locate the .csv file containing the address records

File  No file chosen

How would you like us to handle the import?

Import Option  Overwrite duplicates in Address Book with imported items (keep the new ones)

- Do not overwrite duplicates in Address Book (keep the old ones)
- Add all imported items to Address Book - without affecting any existing entries
- Replace entire Address Book with imported items

Names option  Accept nickname as-is (do not take from firstname or lastname)

- If nickname not present, use firstname as nickname
- If nickname not present, use lastname as nickname

(Why is this important? The nickname is the field used when searching your Address Book from the telephone.)

One last step

Click on the Import button below to begin importing your Address Book.

```
"First name","Last name","Email","Home"  
John,Doe,john@example.com,555-555-5555  
Jane,Doe,,555-123-4567  
Karen,,karen@example.com,
```

Click the **Choose File** button to select a file to be uploaded.

Click the radio button for the **Import Option** you would like to apply to your imported list.

*Note: The import file should be a .csv format and the first row of your .csv file should identify the contact fields (for example, "First name", "Last name", "Home") with each contact entry on a new row.*

*Each contact entry must have either a first name or a last name entry.*

Click the **Import** button to begin the import process.

# Messaging Portal

## Options - Settings

Navigate to **Options** tab on the top navigation bar and select the **Voicemail** sub-menu tab.

Select the **Message Ordering** preference from the options provided.

Determine the **Message Header Size** preferred and click the appropriate radio button

Select the desired **Prompt Level** option

Set-up an **Auto login** option by entering the phone number that you will be calling from to check messages.

The screenshot shows the 'Voicemail Settings' page. At the top, there is a navigation bar with 'Home', 'Messages', 'Contacts', and 'Options' tabs. Below this is a sub-menu bar with 'Voicemail', 'Fax', 'Greeting', 'Notifications', 'Attendant', 'Lists', 'Wakeup', and 'Reminders' tabs. The 'Options' tab is selected. The page title is 'Voicemail Settings'. Below the title, there is a heading 'Specify various settings to tailor your voicemail.' and several settings sections:

- Message Ordering:** Radio buttons for 'newest first' (selected), 'oldest first', 'by priority', and 'by sender'. Description: 'Select the ordering for message play back. You may choose to have the newest messages played first, the oldest messages played first, messages with priority played first, or messages ordered by the sender's telephone number played first.'
- Message Header Size:** Radio buttons for 'full' (selected) and 'abbreviated'. Description: 'Select the level of detail (abbreviated or full) when message headers are played back. Experienced users can select abbreviated headers to save time.'
- Auto Play:** Radio buttons for 'disabled' (selected) and 'enabled'. Description: 'Access your messages faster. If enabled, all new messages that have been left for you will be played back immediately after you log in to your account. Your greeting and menu options will be bypassed.'
- Prompt Level:** Radio buttons for 'standard' (selected) and 'expert'. Description: 'Select the type of prompting used: standard or expert. Standard prompts are more verbose than expert prompts. Expert prompts enable you to access and navigate the system more quickly once you are familiar with the system.'
- Auto Login:** A text input field labeled 'Number' with 'Phone Number' entered. Description: 'When calling from this phone number, your PIN is not required to access your account.'

At the bottom of the page, there are two buttons: 'Update' and 'Cancel'. The 'Update' button is highlighted with a blue line.

Once selections are complete, click the **Update** button to save your settings.

# Messaging Portal

## Fax Forwarding

Navigate to the **Fax** tab by using the **Options** tab from the top navigation bar and selecting the **Fax** sub-menu option.

Enter an email address in the **Email** field and click the **Add** button to add an entry to the **Recipients** list.

VOICE MAIL

Home Messages Contacts Options John Doe (919) 457-9571 My Account Logout

Voicemail Fax Greeting Notifications Attendant Lists Wakeup Reminders

### Automatic Fax Forwarding

You can have your faxes automatically forwarded. Enter the email address(es) below (separated by commas or spaces).

Email  Add

Recipients jdoe@doe.com Delete

Update Cancel

Delete a recipient from the **Recipient** list, by selecting the recipient using the down arrow and clicking the **Delete** button

To implement changes, click the **Update** button

Organizations can use Automatic Fax forwarding to setup of delivery of voice messages to their email in-box. This enables all messages to be managed using the same interface...the email inbox.

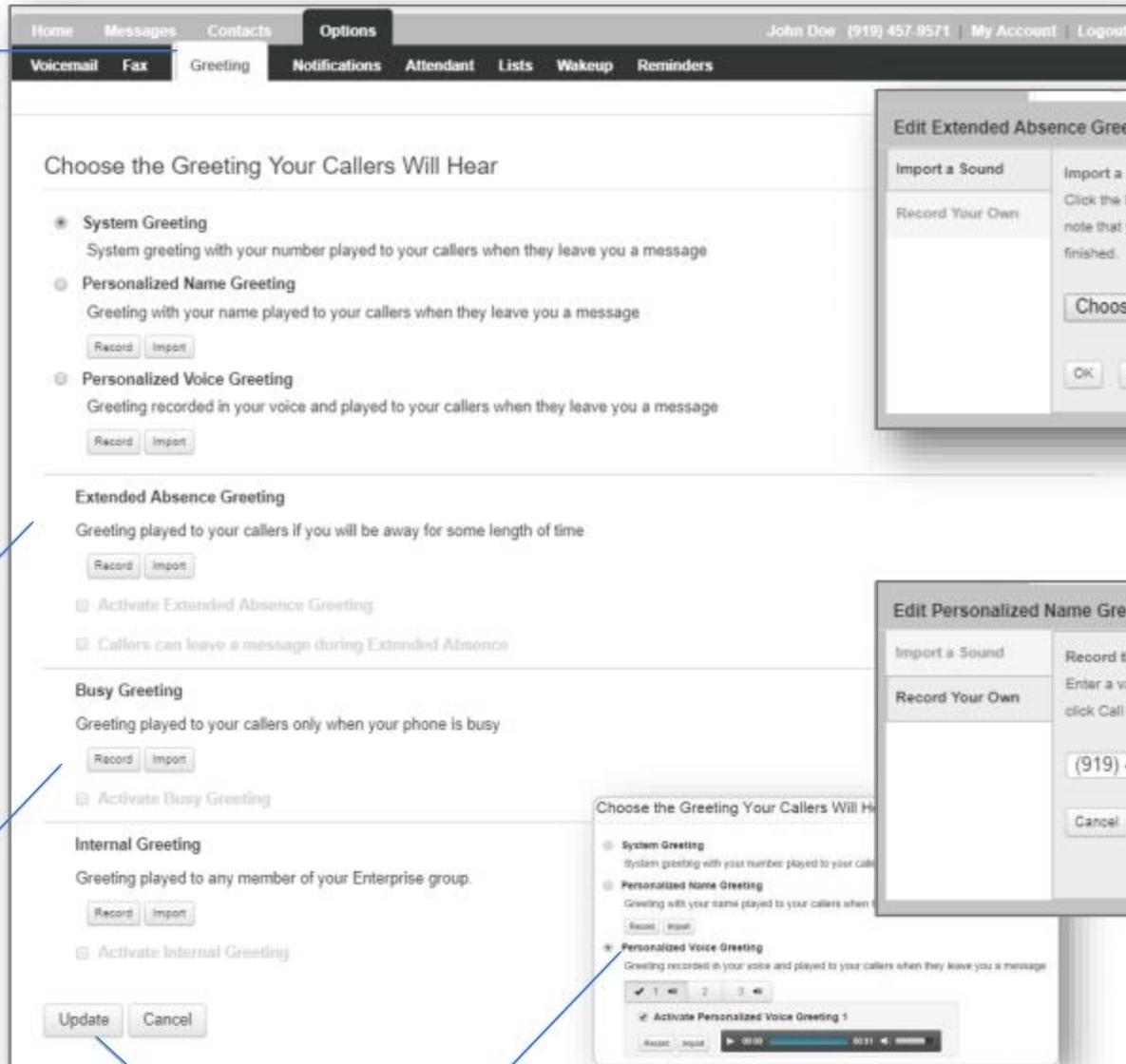
# Messaging Portal Greetings

Navigate to the **Greetings** menu by using the quick link on the **Home** page or tab by selecting the **Options Tab** from the top navigation bar and the Greetings tab from the sub-menu tab

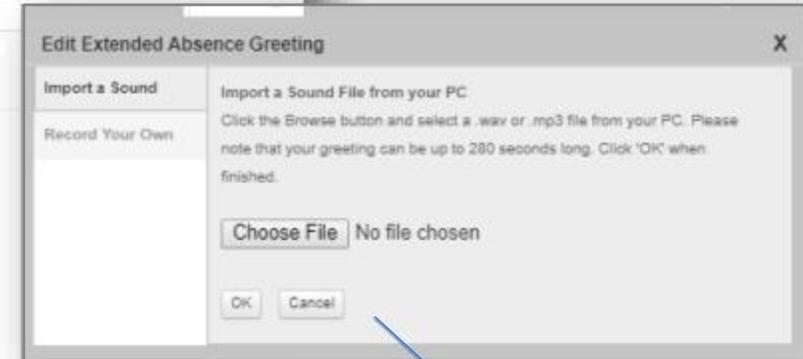


Select the type of Greeting from those provided by clicking the radio button or check box on the left side of each option.

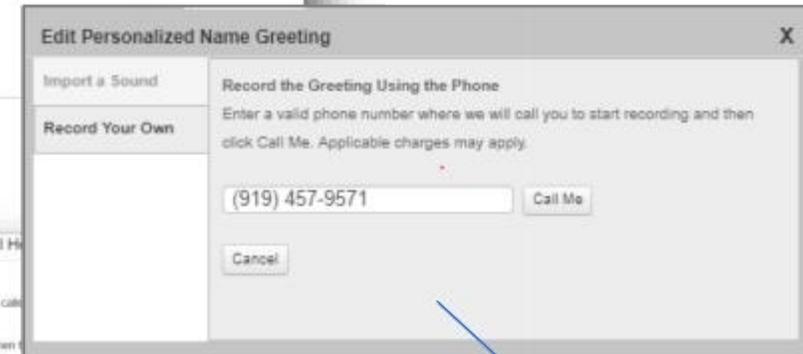
Click the **Record** or **Import** button and follow the steps provided in the greeting wizard.



Listen to each recording and activate by clicking the **Update** button .



To upload a pre-recorded greeting, select the **Import a Sound** option on the left column and click the **Choose File** button and elect **OK** to save.



To record a greeting, click the **Record your Own** option on the left tab and enter the phone number where you would like to be called and click the **Call Me** button. The system will call you and record your greeting. Once you have completed your greeting, select the **#** key on your phone to save the recording,

# Messaging Portal

## Options - Notifications

14avigate to the **Options** tab and select the **Notifications** option.

Select *how* you would like to be notified by checking the appropriate box and entering your **Email** address and / or **Phone** number.

The screenshot shows a web interface for an Automated Attendant. At the top, there is a logo for 'AUTOMATED ATTENDANT' and a navigation bar with tabs for 'Home', 'Setup', 'Messages', and 'Options'. The 'Options' tab is selected, and a sub-menu shows 'Notifications', 'Mailbox Greeting', and 'Call Announce'. The 'Notifications' sub-tab is active. Below the navigation, there is a text box stating: 'We can notify you with an email or a phone call when a message is left in your mailbox.' There are two main sections: 'Email' with a checkbox and a text input field, and 'Phone' with a checkbox and a text input field. Below these, there are options to 'Check the days of the week and the times during which you want to be notified by phone.' This includes a 'Days' section with checkboxes for S, M, T, W, T, F, S, and a 'Times' section with dropdown menus for 'All Day', '12 :00 am', and '12 :00 am'. At the bottom of the form are 'Update' and 'Cancel' buttons.

Click the **Update** button to save the **Notifications Schedule**.

Select *when* you would like to be notified by checking the appropriate **Days** box and entering the time of day using the scheduling tools provided.

# Messaging Portal

## Options – Attendant

Navigate to the **Options** tab and select the **Attendant** tab from the sub-menu.

Enter the **Attendant Call Number** in the field provided

The screenshot shows a web interface for configuring an attendant. At the top, there is a 'VOICE MAIL' header and a navigation bar with tabs for Home, Messages, Contacts, Options, and a user profile for John Doe. Below the navigation bar, there is a sub-menu with tabs for Voicemail, Fax, Greeting, Notifications, Attendant, Lists, Wakeup, and Reminders. The 'Attendant' tab is selected. The main content area has the following sections:

- Attendant Call Number:** A text input field containing '(919) 457-9571'. A note above it says 'Your callers can press 0 to be connected to this number to get assistance.'
- Attendant Schedule:** A section with a note 'Check the days of the week and the times during which your Attendant is available.' It includes a 'Days' row with radio buttons for S, M, T, W, T, F, S, where M, T, W, and F are selected. Below this is a 'Times' row with a dropdown menu set to 'All Day', followed by two time pickers: '12:00 AM' and '12:00 AM'.
- At the bottom of the form are two buttons: 'Update' and 'Cancel'.

Click the **Update** button to save the **Attendant Schedule**.

Enter *when* you would like the Attendant option available by selecting the **Days** and **Times** in the **Attendant Schedule** section of the menu.

The attendant function is essentially a customization option to choose a personal operator for an individual mailbox. It can be as simple as providing the number for the organization's main receptionist or as focused as the personal assistant for an executive. Users can also choose a site or department level administrative assistant, if that option is available. It's best practice to only offer this option during business hours so a caller is not transferred to an operator, only to get another mailbox.

# Messaging Portal

## Options – Lists

Navigate to the **Options** tab and select the **List** sub-menu tab.

Create a list identification by entering a number in the **List ID** field.

To remove a contact for the list, simply select the contact name for the window on and click the **Remove From List** button.

Click the **Update** button to save the **Attendant Schedule**.

VOICE MAIL

Home Messages Contacts **Options** John Doe (919) 457-9571 My Account Logout

Voicemail Fax Greeting Notifications Attendant **Lists** Wakeup Reminders

### Create List

Enter a List ID. Create a list by entering a phone number of any valid account in the Contact box and clicking Add. When done with the list, click Update.

List ID  (The List ID must be a number between 1 - 99 inclusive)

0 of 25 Contacts

Contact  Add

Remove From List

Update Cancel

Enter the Contact details in the **Contact** field provided and click the **Add Button** to add contact to the list

The list feature allows employees of an organization to create a personal distribution list to simplify sending of messages to multiple contacts. List are defined by assigned each list a number and then adding individual contacts.

# Messaging Portal

## Options – Wakeup

Navigate to the **Options** tab and select the **Wakeup** sum-menu tab.

Select how you would to receive wakeup calls by clicking the **Schedule Wakeup Call** button.

The screenshot shows the 'VOICE MAIL' interface. The top navigation bar includes 'Home', 'Messages', 'Contacts', 'Options', and user information 'John Doe (919) 457-9571 | My Account | Logout'. Below this is a sub-menu with 'Voicemail', 'Fax', 'Greeting', 'Notifications', 'Attendant', 'Lists', 'Wakeup', and 'Reminders'. The 'Wakeup' section is active, displaying the heading 'Wakeup' and a brief instruction: 'Stay organized and on time with a wakeup call whenever you need one. Create a wakeup call by clicking the Schedule Wakeup Call button, or click a wakeup call in the list below to edit it.' Below the instruction are two columns: 'Number' and 'Date / Time'. The 'Number' column shows 'You have no Wakeup Calls scheduled.' with a 'Schedule a new' link and a 'Schedule Wakeup Call' button. The 'Date / Time' column shows a 'Schedule Wakeup Call' form with the following fields: 'Phone Number' (text input), 'Starting Date' (Month: June, Day: 6, Year: 2019), 'Time' (Hour: 8, Minute: :00, AM/PM: AM), 'Time Zone' (Dropdown: (UTC -05:00) New York, Toronto), and 'Recurrence' (Radio buttons: Weekday, Weekend). The form also includes an 'Update' button and a 'Cancel' button.

Complete the **Schedule Wakeup Call** fields by providing a **Phone Number**

Schedule your wakeup calls by providing the **Phone Number, Dates, Time** and frequency in the fields provided.

Once complete, select **Update** to save your settings.

# Messaging Portal

## Options – Reminders

Navigate to the **Options** tab and select the **Reminder** sub-menu tab.

When reminders are set up the telephone interface, they appear in the **Reminder** option page.

To update a reminder, click the telephone number highlighted in blue.

To cancel a reminder, click the reminder check box and lick the **Cancel** button.

VOICE MAIL

Home Messages Contacts **Options** John Doe (919) 457-9571 | My Account | Logout

Voicemail Fax Greeting Notifications Attendant Lists Wakeup **Reminders**

### Reminders

Remember appointments by scheduling a phone call to play back your recorded reminder message at any day and time. Click a reminder message in the list below to edit it.

Number	Date / Time
(919) 457-9571	6 June 2019, 8:00pm

Cancel

### Reminders

Please enter the starting date and time of the Reminder Message. Specify how often you want to receive the Reminder Message.

Phone Number +19194579571

Starting Date June 6, 2019

Time 8:00 PM

Time Zone (UTC -05:00) New York, Toronto

Times will automatically adjust for Daylight Saving Time

Recurrence  One-time  Daily  Daily on Weekdays Only  Daily on Weekends Only  Only on these Days

S M T W T F S

Message 00:00 00:02

Update Delete Cancel

Update the reminder details by updating the fields provided. Fields that can be updated are **Phone Number, Date, Times, and Recurrence.**

To listen to the pre-recorded reminder **Message**, click the play arrow button.

**Contact Us:**  
Support@razorline.com  
(504) 274-1700