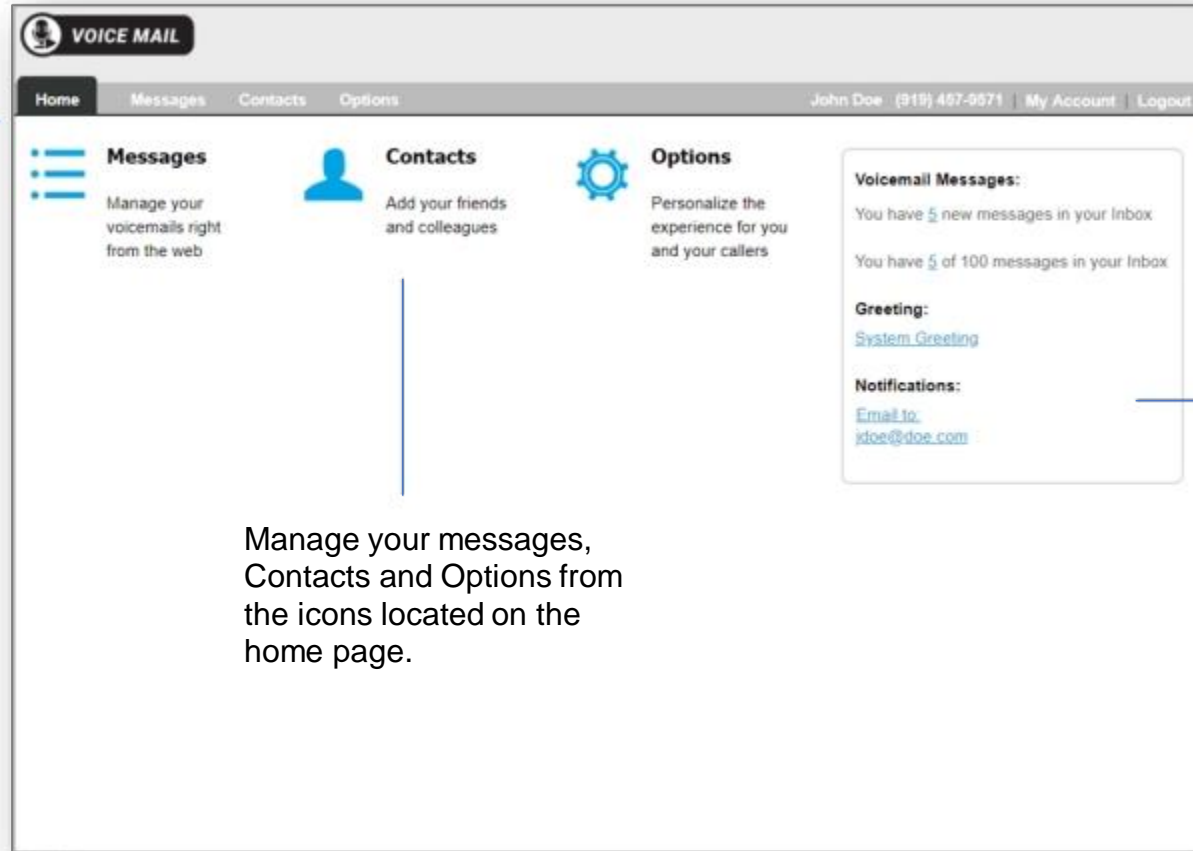


# Quick Reference Guide for Messaging Portal

**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

Manage your messages, Contacts and Options from the icons located on 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) 457-9871'. Below the navigation bar, 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'. To the right of the message list, there are action buttons: 'Forward Message', 'Download', 'Mark as Saved', and 'Delete'. A 'Sort By' dropdown menu is open, showing options: 'Caller', 'Date', 'Mark as Saved', and 'Mark as New'. 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. It also shows the message details: 'Message 34 sec voice message' and 'Send' and 'Cancel' buttons.

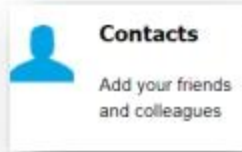
When a message is selected menu options will be presented. Select an option by clicking the box of choice.

**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

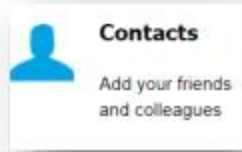
A screenshot of a web application interface for managing contacts. The top navigation bar includes "Home", "Messages", "Contacts", and "Options". The user is logged in as "John Doe (919) 457-9571" with links for "My Account" and "Logout". Below the navigation bar, there are two buttons: "Add Contact" and "Search Contacts". The main content area is split into two columns. The left column has "All Contacts" and "No Contacts" sections. The right column is titled "New Contact" and contains a form with the following 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.

**VOICE MAIL**

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

Voicemail Fax Greeting Notifications Attendant Lists Wakeup Reminders

### Voicemail Settings

Specify various settings to tailor your voicemail.

**Message Ordering**

newest first  oldest first  by priority  by sender

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**

full  abbreviated

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**

disabled  enabled

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**

standard  expert

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**

Number

When calling from this phone number, your PIN is not required to access your account.

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.



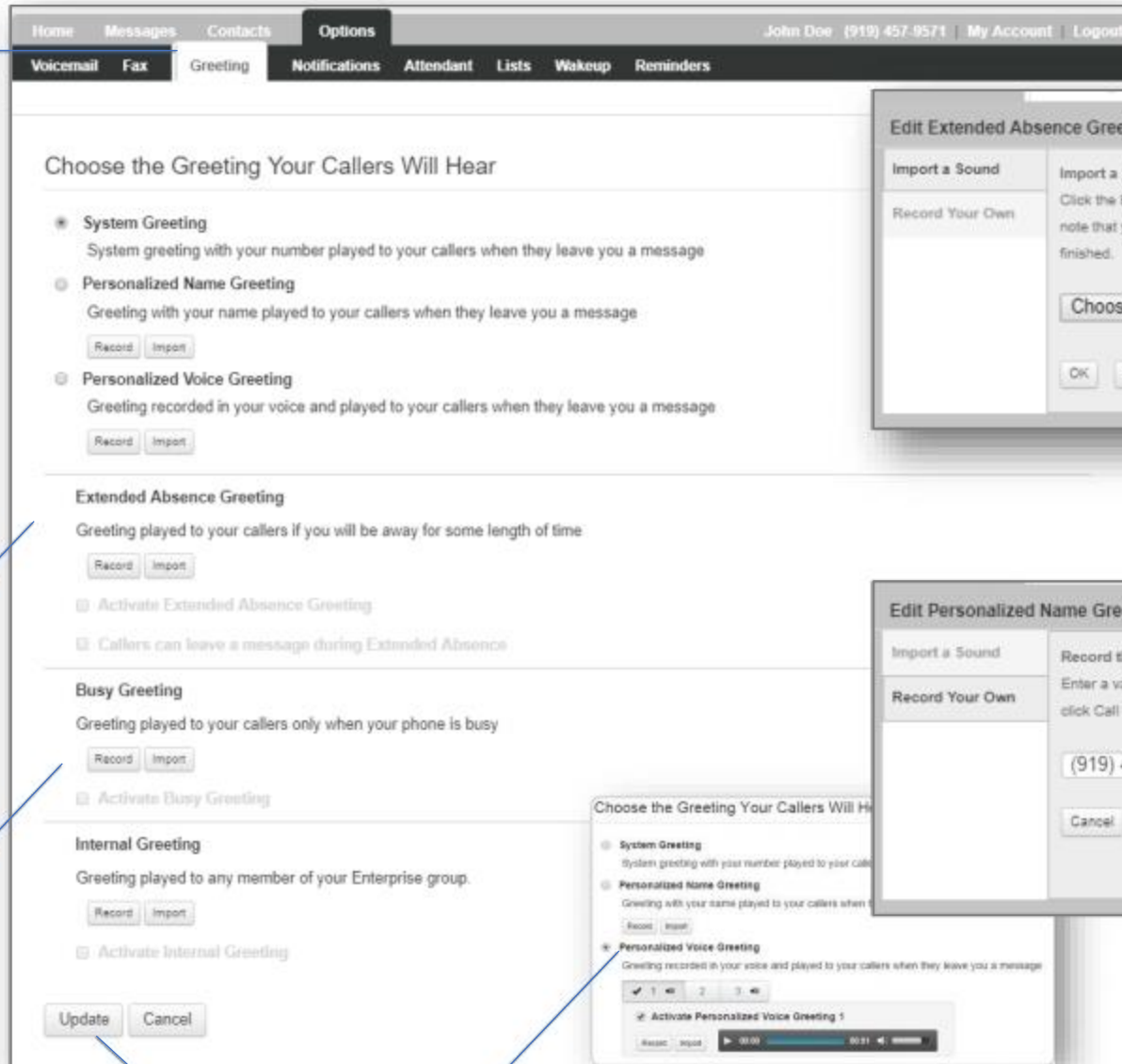
# Messaging Portal Greetings

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

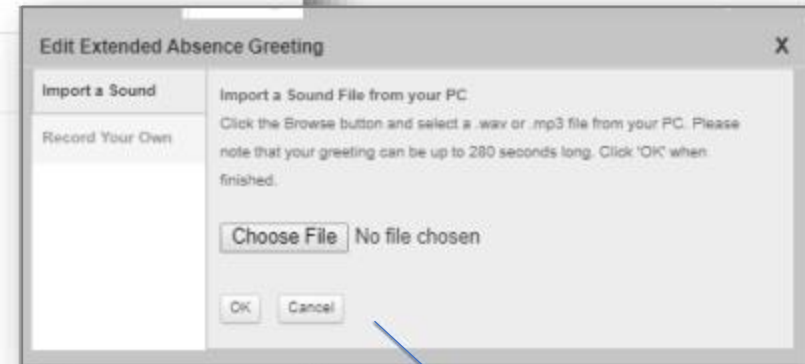


Select the type of Greeting from those provided by clicking the radio button or check box on the left side of each option.

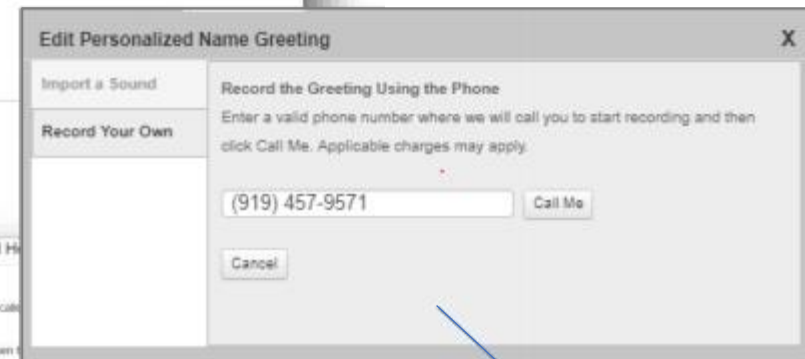
Click the **Record** or **Import** button and follow the steps provided in the greeting wizard.



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 the 'Automated Attendant' interface. At the top, there is a navigation bar with 'Home', 'Setup', 'Messages', and 'Options' (the active tab). Below this is a sub-navigation bar with 'Notifications', 'Mailbox Greeting', and 'Call Announce'. The main content area contains a form for setting notification preferences. It starts with the text: 'We can notify you with an email or a phone call when a message is left in your mailbox.' There are two checkboxes: 'Email' and 'Phone'. The 'Email' checkbox is checked, and there is a text input field for an email address with a placeholder 'e.g. you@your\_isp.com - separate multiple addresses with a comma or spaces'. The 'Phone' checkbox is unchecked, and there is a text input field for a phone number with the placeholder 'Enter your phone number'. Below these is a section for scheduling: 'Check the days of the week and the times during which you want to be notified by phone.' There are checkboxes for each day of the week: S, M, T, W, T, F, S. The 'T' (Tuesday) checkbox is checked. Below the days are 'Times' dropdown menus: '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 navigation bar with 'VOICE MAIL' and a user profile '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 'Attendant' sub-menu is selected. The main content area has three sections: 'Attendant Call Number' with a text input field containing '(919) 457-9571'; 'Attendant Schedule' with a section for selecting days of the week (S, M, T, W, T, F, S) and times (All Day, 12:00 AM, and 12:00 AM); and 'Update' and 'Cancel' buttons at the bottom.

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

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

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

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, there are two tabs: 'Number' and 'Date / Time'. The 'Number' tab is selected, showing the text 'You have no Wakeup Calls scheduled.' and a link 'Schedule a new'. A 'Schedule Wakeup Call' button is visible. A modal window titled 'Schedule Wakeup Call' is open, containing the following fields: 'Phone Number' (text input), 'Starting Date' (dropdowns for month, day, and year), 'Time' (dropdowns for hour, minute, and AM/PM), 'Time Zone' (dropdown menu), and 'Recurrence' (radio buttons for 'Weekday' and 'Weekend'). 'Update' and 'Cancel' buttons are at the bottom of the modal.

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
<a href="#">(919) 457-9571</a> <input checked="" type="checkbox"/>	6 June 2019, 8:00pm

### Reminders

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

Phone Number

Starting Date

Time

Time Zone

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

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