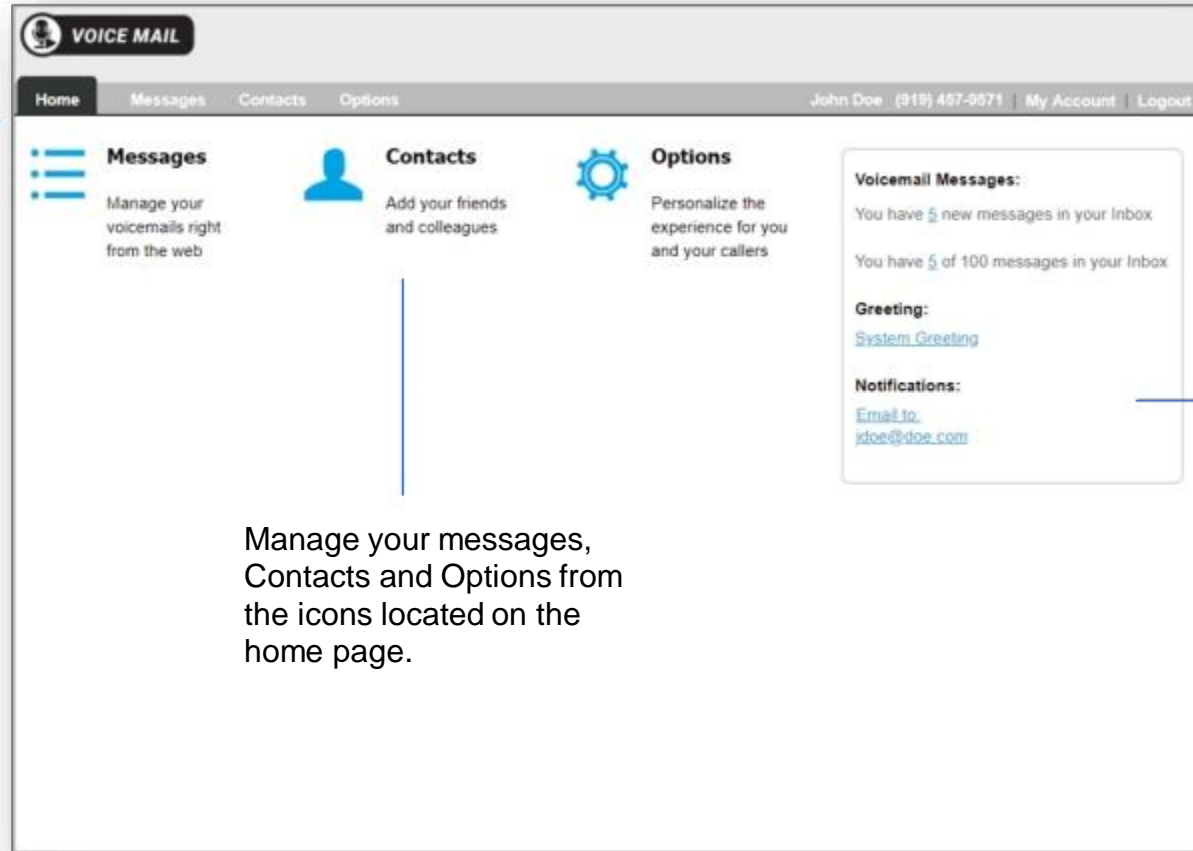


Quick Reference Guide for Messaging Portal



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.

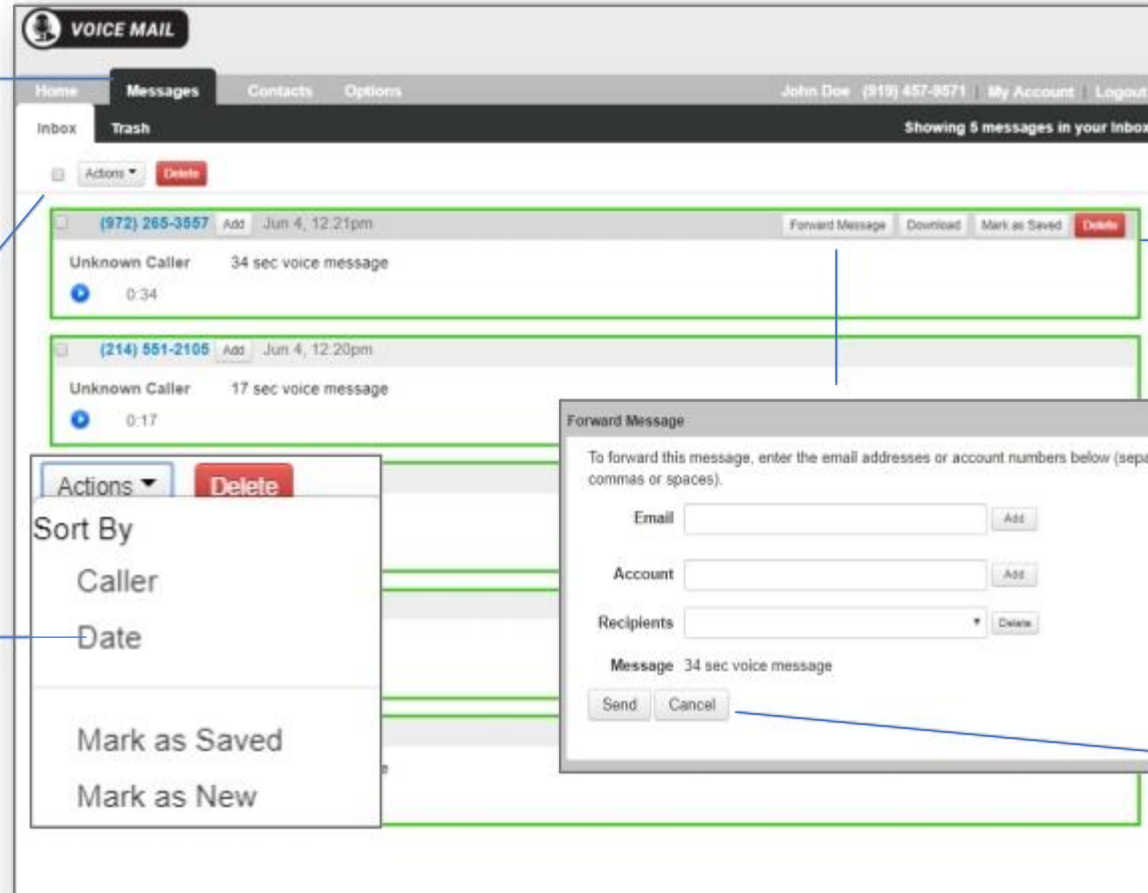
Messaging Portal

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.



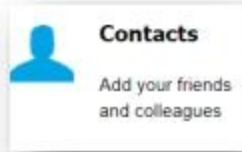
When a message is selected menu options will be presented. Select an option by clicking the box of choice.

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

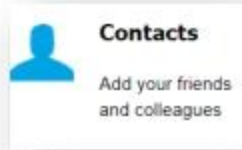
A screenshot of a web application interface for managing contacts. At the top, there is a navigation bar with tabs for "Home", "Messages", "Contacts", and "Options". The "Contacts" tab is selected. To the right of the navigation bar, the user's name "John Doe" and phone number "(919) 457-9571" are displayed, 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 two tabs: "All Contacts" and "No Contacts". The right column contains a "New Contact" form. The form has several input fields: "First name" (containing "Jane"), "Last name" (containing "Doe"), "Nickname" (empty), "Company" (containing "Doe's Plumbing"), "File as" (a dropdown menu set to "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', 'Options', and user information 'John Doe (919) 457-9571 My Account Logout'. Below this is a sub-menu bar with 'Voicemail', 'Fax', 'Greeting', 'Notifications', 'Attendant', 'Lists', 'Wakeup', and 'Reminders'. The main content area is titled 'Voicemail Settings' and includes the instruction 'Specify various settings to tailor your voicemail.' The settings are as follows:

- 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 form are 'Update' and 'Cancel' buttons. A blue line points from the 'Update' button to the text below the screenshot.

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.

The screenshot shows a web interface for 'VOICE MAIL'. At the top, there is a navigation bar with tabs: Home, Messages, Contacts, Options, and a user profile section for 'John Doe (919) 457-9571' with links for 'My Account' and 'Logout'. Below this is a sub-navigation bar with 'Voicemail' and 'Fax' tabs. The 'Fax' tab is active, showing a 'Greeting' dropdown and buttons for 'Notifications', 'Attendant', 'Lists', 'Wakeup', and 'Reminders'. The main content area is titled 'Automatic Fax Forwarding'. It contains the text: 'You can have your faxes automatically forwarded. Enter the email address(es) below (separated by commas or spaces)'. There are two input fields: 'Email' with an 'Add' button, and 'Recipients' with a dropdown menu showing 'jdoe@doe.com' and a 'Delete' button. At the bottom, there are 'Update' and 'Cancel' buttons.

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.

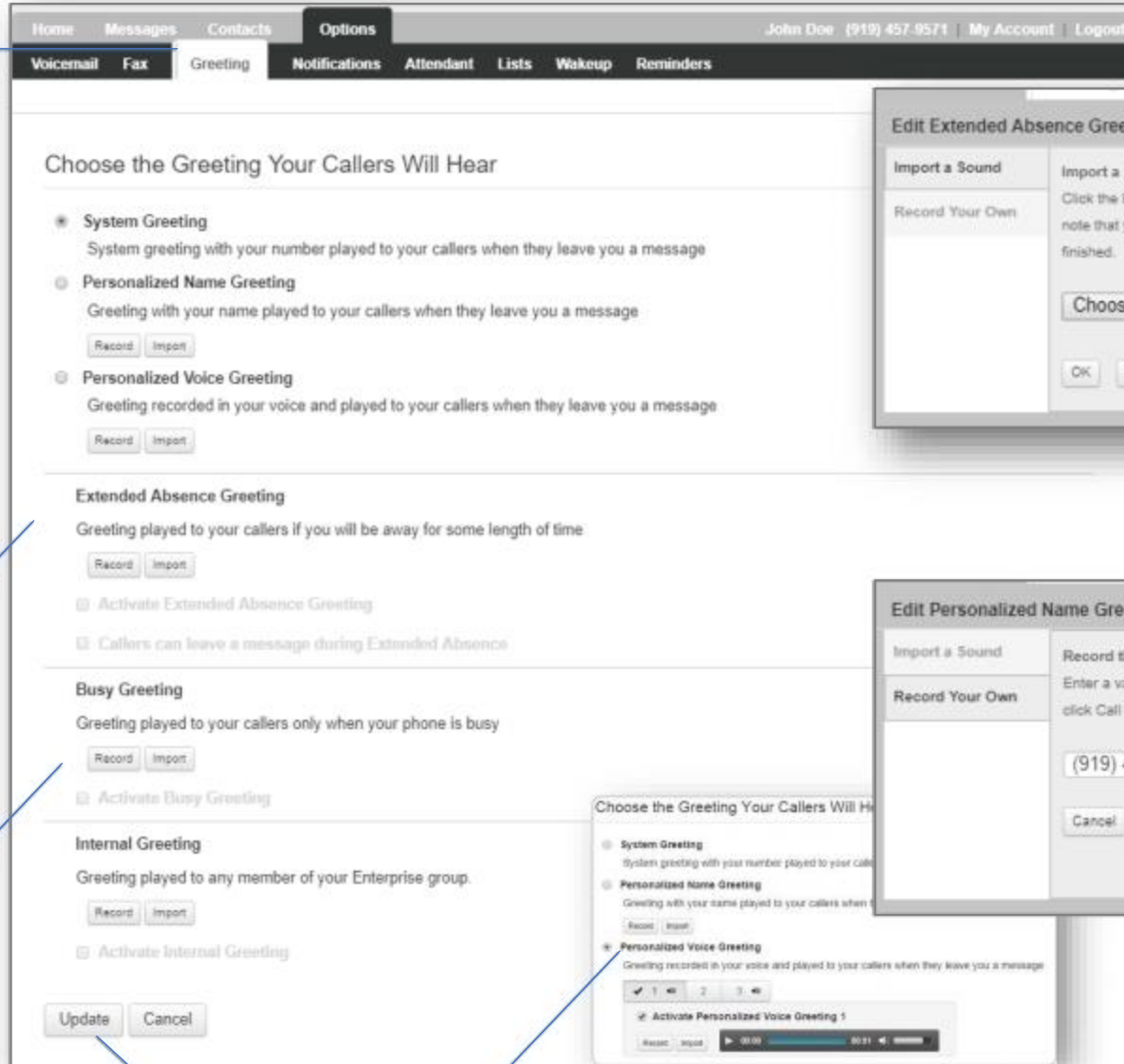
Messaging Portal Greetings

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

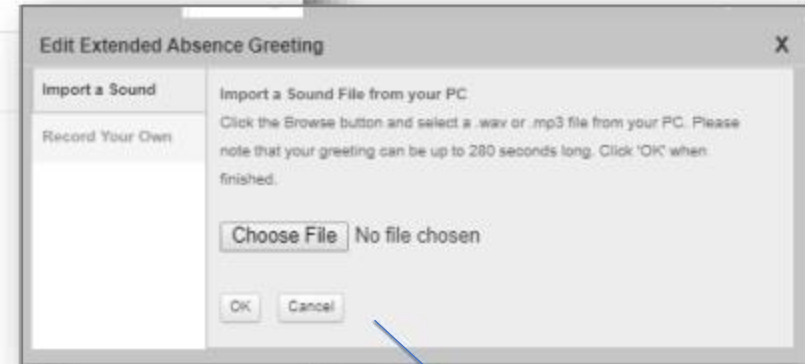


Select the type of Greeting from those provided by clicking the radio button or check box on the left side of each option.

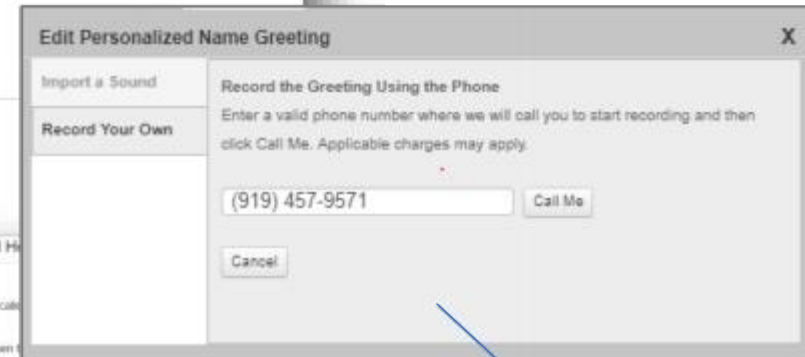
Click the **Record** or **Import** button and follow the steps provided in the greeting wizard.



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' web 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 configuring notifications. It starts with a heading: 'We can notify you with an email or a phone call when a message is left in your mailbox.' Below this are two sections: 'Email' with a checkbox and a text input field, and 'Phone' with a checkbox and a text input field. The 'Email' field has a placeholder example: 'e.g. you@your_isp.com - separate multiple addresses with a comma or spaces'. Below the 'Phone' field is a section for scheduling: 'Check the days of the week and the times during which you want to be notified by phone.' This section includes 'Days' with checkboxes for S, M, T, W, T, F, S, and 'Times' 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 navigation bar with tabs for Home, Messages, Contacts, Options, and a user profile section for John Doe. Under the Options tab, there are sub-tabs: Voicemail, Fax, Greeting, Notifications, Attendant (selected), Lists, Wakeup, and Reminders. The main content area is titled 'Attendant Call Number' and includes a text input field containing '(919) 457-9571'. Below this is the 'Attendant Schedule' section, which has a text input field and a sub-section for scheduling. The scheduling section includes a 'Days' row with checkboxes for S, M, T, W, T, F, and S, and a 'Times' row 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 **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 (911) 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', 'John Doe (919) 457-9571', 'My Account', and 'Logout'. The 'Options' sub-menu is expanded, showing 'Voicemail', 'Fax', 'Greeting', 'Notifications', 'Attendant', 'Lists', 'Wakeup', and 'Reminders'. The 'Wakeup' page contains a heading 'Wakeup' and a paragraph: '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 this is a section with 'Number' and 'Date / Time' headers. It states 'You have no Wakeup Calls scheduled.' and includes a 'Schedule a new' link. A 'Schedule Wakeup Call' button is visible. A modal window titled 'Schedule Wakeup Call' is open, with the instruction: 'Please enter the starting date and time of the Wakeup Call. Specify whether the call is for Weekdays or Weekends.' The modal contains the following fields: 'Phone Number' (text input), 'Starting Date' (dropdowns for month, day, and year), 'Time' (dropdowns for hour, minutes, 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
(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

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