



## **Unified Messaging PROVoice / PROFax**

### **User's Guide**

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# Introduction

Welcome to Unified Messaging by Mercuri. At the heart of Unified Messaging is the old familiar voice mail. While traditional voice mail systems are able to record and store messages and offer some enhanced features such as page notification, unified messaging goes several steps further in offering a completely integrating communications platform utilizing traditional messaging mediums as well as the Internet and email for delivery of all messages and notifications. In addition Unified Messaging provides features such as integrated fax services, call directing (redirection), allows the placing of calls, E-paging and integrated teleconferencing, to name a few. All of this is packaged into an easy to use and flexible service accessible to the user with one user id and one pass code.

This guide explains in detail how to use Mercuri's Unified Messaging platform to maximize your communications capabilities. Mercuri Unified Messaging was designed to offer a sophisticated communications platform that is very easy to use. If you know how to use voice mail and check your email then you are ready to use this service. Even if you are a novice to computing and voice mail you will be able to quickly learn to use this service and take advantage of all it's capabilities.

## Getting Started

As a new subscriber to this service you will have purchased a package suited to your own needs. All basic functions and management of this service are the same regardless of what package was purchased. At minimum you will now have an access telephone number (either shared or private), one or more mailbox extensions and a pass code by which you will access your management systems either on the Internet or by dialing your access telephone number through any telephone and using a touch-tone keypad. Some management features are available on both methods of access and some are only available on one or the other method. Careful consideration was given as to which features were to be managed by which method (Internet or telephone) based on the convenience and frequency of access. While the telephone offers a convenient method of access it can be very clumsy for certain types of management functions, such as the entering of alpha numeric information (email addresses and names), where as the Internet offers an excellent way to manage your service but is not always accessible and is not suitable for recording greetings..

### ***Basic Mailbox Set-up***

The first thing you will need to do is record a main greeting into all your mailbox extensions. All mailboxes will play a generic mailbox greeting until one is recorded to replace it. To record your mailbox greeting you will need to access the management menus on your mailboxes (commonly called the user backend).

### **Accessing the User Backend**

To access the user backend for any of your mailboxes follow these steps. From any telephone with a touch-tone key pad:

1. Dial your access telephone number (either shared or private). This is the phone number that anyone would call to leave you a message.
2. At the introductory message enter your mailbox extension at any time. Once entered you will hear your main greeting (or the generic greeting if one is not recorded)

3. During the mailbox greeting enter the star key (“\*”) on your touch-tone key pad followed immediately by your 4 digit pass code.
4. If entered correctly you will now hear the main menu on the user backend.
5. If the service does not respond, simply try again as some of the digits may not have entered correctly.

**NOTE:** When using a cell phone to access this service touch-tones are not always received, especially when the connection is of poor quality such as when calling from an outlying area. You may need to be very deliberate when entering touch-tones to make sure that each tone was long enough to be received by the system.

## **Recording a Mailbox Greeting**

Each mailbox has a main greeting. Optionally you may also record a temporary greeting and an after hours greeting, which will be explained in detail further on in this guide. All greetings are recorded in the same manner and maybe re-recorded as needed.

To record your Main Greeting follow these steps:

1. Press 2 from the user backend main menu
2. From the Recording Menu, Press 1 to record your main greeting.
3. To record your Main Greeting, press 1 again to begin recording
4. The service will prompt with “Begin recording at the tone” followed by a brief beep.
5. Begin recording your main greeting. When you are finished recording press 1 again and your greeting will be played back to you.
6. If you are happy with your greeting then press 1 to save it. If you wish to re-record it press 2 and go back to step 4. To hear the greeting again before saving press 3 or if you wish to cancel recording press 9.
7. If you pressed 1 to save the greeting or 9 to cancel you will be returned to the previous menu.

You have now completed the basic set-up of your Unified messaging service. If you have more than one mailbox you will need to record main greetings for each one. You may change mailboxes in the recording menu, then follow the steps above to complete all recordings. Below are some examples of typical mailbox greetings.

### **Sample 1**

“You have reached the desk of John Doe <insert own name>. I am currently on the phone or away from my desk. Please leave me a detailed message at the tone including your name and telephone number and I would be happy to return your call as soon as possible...”

### **Sample 2**

“You have reached the desk of John Doe <insert own name>. I am currently on the phone or away from my desk. Please leave me a detailed message at the tone including your name and telephone number and I would be happy to return your call as soon as possible or for more options press the pound key now...”

### **Sample 2**

“You have reached the desk of John Doe <insert own name>. I am currently on the phone or away from my desk. Please leave me a detailed message at the tone including your name and telephone number and I would be happy to return your call as soon as possible. To connect to my cell phone you may press 1 now. To page me directly you may press 2 now. To send me a fax press 3 now or to receive the current fax hot sheet press 4 now or press 0 to return to the main introduction.”

Note that not all mailbox options need to be presented to the caller, only those that you wish to use as part of your mailbox features. Other options such as teleconferencing are available as well.

## **Caller Front-end**

Now that you have recorded your main greeting you are ready to receive voice mail and faxes on your mailbox extensions. To do this you would publish your access telephone number and mailbox extension(s) by placing it in advertising, on your website, on business cards and in all the usual ways that business is conducted. You would use your access telephone number like it was your own telephone number. When callers wish to reach you they would call the access telephone number and enter one of your mailbox extensions and hear your current mailbox greeting. At the end of the greeting the caller would hear the tone and beginning recording a message. The caller would typically hang up when done recording, at which time the message is delivered to you. At this point you would be notified by email and pager (if you have one) of the new message immediately.

This describes the most typical situation familiar to any one who has ever left a voice mail message. Now let's discuss all the advanced features available on each mailbox.

### ***Options Menu***

When the caller presses the pound key during your mailbox greeting they will be presented with a menu of options available to them on the mailbox. The option to press pound may be included as part of the mailbox greeting as in the examples in the previous section. The options may also be selected directly from the greeting as well. If the caller presses pound they will hear either the default options menu or a custom menu recorded by the user. The custom menu will include some or all of the options for the mailbox as required by the user.

### ***Call Directing***

This is option number 1 and is available on all mailbox extensions except in the *basic* package. By pressing 1 the caller is re-directed to your current forwarding number. The caller is unaware which number to which they are being forwarded. The user must have programmed up to three telephone numbers to direct calls towards and selected one of those numbers to be the current number. This is done on the website self care pages.

The current number may be any one of the three numbers: home, work or cell phone. The call directing can be turned off by selecting none of the three numbers, in which case the caller is informed that the feature is not currently available. The current call directing number can be selected via the website self care or on the user backend

When the call is directed to your current number, the caller id of the caller will be displayed on your phone if you have caller id on your line and if a caller id is available (the caller is not anonymous).

### ***Direct Paging***

This is option 2 and is available on all mailboxes. The user must have pre-programmed a pager number to dial or the caller will be told that the feature is not available. When selected the caller will be connected directly to the user's pager where they can enter or record any message they choose. The type of message will depend on the capabilities of the user's paging service.

### ***Sending a Fax to a Mailbox***

This is option 3 on the menu. Every mailbox is able to receive faxes by pressing this option. It is also possible to set a mailbox as "*Fax Only*" (in web site Self Care) in which case the fax tone is heard immediately after the mailbox extension is entered from the main introduction. This allows for a dedicated fax extension, which may be easier to use than selecting this option from the mailbox greeting. Regardless of the type of mailbox, fax messages are stored and delivered in the same manner.

As soon as the fax option is selected the fax tone is heard and the caller can send a fax to this mailbox extension. The caller will need to have dialed manually from their fax machine or have entered the telephone number, mailbox extension and fax option ahead of time with the appropriate pauses to allow for the call to connect.

Dedicated inbound fax lines are also available with this service where caller's can send a fax directly to a telephone number without the need to enter extra mailbox extensions, pauses, etc. The dedicated phone number behaves just as a regular fax machine would and the caller would believe that they are calling a regular fax line. Fax messages received in this way are still delivered in the same manner.

### ***Requesting the Fax Hot Sheet***

If the user has loaded a fax "Hot Sheet" (also know as a fax back) into the mailbox then the caller may request this fax by pressing option 4. If a fax document is available, the service will prompt the caller for their local or toll free telephone fax number where the Hot Sheet will be delivered. The fax will be queued and sent as soon as possible, usually immediately.

This feature is typically used as an advertising or marketing tool to promote the products or services the user is offering or to store other documents such as a job application or other information the user wishes to be make available to callers. This feature is available on all mailboxes.

### ***Joining a Teleconference***

This is option 5 on the menu. If the user has started a teleconference from the user backend then the caller will be joined to the conference when this option is selected. The teleconference may be joined from *any* mailbox extension that belongs to the user. If no teleconference is in progress then the caller will be informed as such and returned to the options menu. The caller may hang up to leave the conference at any time and then rejoin the conference if necessary. The conference is over when the user hangs up at which time all callers are disconnected from the teleconference.

**NOTE:** Teleconferencing is a pay per use service available to the user on demand. Every participant in a teleconference will be billed to the user on a per minute basis.

### ***Extra options***

This is selection 8 from the options menu. This is included so that the options menu will not get overcrowded with too many choices for the caller, which can lead to confusion. All items on the extra options menu are available in the regular options menu as well. Extra option number 1 is to join a teleconference, option number 2 is to receive the fax "Hot Sheet", option number 9 is to leave a message and option 0 is to return to the previous menu

### ***Leave a Message***

The caller may press 9 should they decide that they only want to leave a voice mail message after all. The caller will hear the tone to record and may hang up when done or enter a touch-tone to return to the options menu, or press 0 to return to the main introduction.

### ***Zero Out Option***

The caller may press 0 to return to the main introduction of the service, or to the previous menu in the case of the extra options menu. If the zero out optional phone number is set then the caller will be forwarded to that phone number instead of returning to the main introduction. This feature allows forwarding of calls to a corporate head office or legacy PBX.

### ***Name Search***

When a caller dials your access telephone number but cannot remember your extension they may enter the star key from the main introduction ("\*") to search for your mailbox extension by name. The service will prompt the caller to enter the first few letters of your last name (minimum 3) by spelling it with the letter combinations on the touch-tone keypad. The caller will then be presented with all the potential matches to the name entered. The caller will hear the short greeting of each match and then be prompted to either select that mailbox or try the next match, until the list of matches is finished. The short greeting will typically be just the user's name and possibly the mailbox extension (i.e. "John Doe...extension 1500"), as recorded by the user. If no short greeting was recorded then only

the mailbox extension is played to the caller. Once a match is selected the caller will be put directly into that mailbox as if the extension was entered from the main introduction.

## User Backend

The Getting Started section above described how to access the user backend on the telephone with a touch-tone keypad. This section will describe the remaining functions on the user backend.

### Message Retrieval

The first option on the user backend is to check messages by pressing 1. This will take the user to the message menu. From here the user can check for new messages by pressing 1, saved messages by pressing 2, faxes by pressing 3 or the user can return to the main menu by pressing 9. The procedures for new and saved messages are essentially the same.

### New and Saved Messages

When checking for messages, *all* mailboxes belonging to the user will be checked regardless of which mailbox was entered in the main introduction. The mailbox that was entered at the main introduction will always be checked first, however, followed by the remaining mailboxes in the account. The user will be told immediately how many messages are in the mailbox and proceed to play the first message. If no messages are available then the next mailbox is checked. During or after the message the user may select one of several options for the message.

There are several additional options available to the user while listening to a voice mail message. During playback the user may rewind, pause or fast forward the message playback. The user can also speed up or slow down playback as well as increase or decrease the volume of playback. Speed and volume settings remain in effect for the remainder of the messages. See the diagram below for a map of the special playback control keys.

1 Replay	2 Delete	3 Save
4 Rewind	5 Pause	6 Fast Fwd
7 Faster	8 Louder	9
* Slower	0 Softer	#

By pressing 1 the user can replay the message. Pressing 2 will delete the current message and advance to the next message. Pressing 3 will save the current message under the user's saved messages and advance to the next message. (If the user is currently listening to saved messages this selection has no effect other than to advance to the next message without deleting the current message). To forward this message to another mailbox press 4. To delete all remaining messages in this mailbox press 5 (see note below). Pressing 6 will give the user more options (see below). Pressing 8 will skip the rest of the messages in this mailbox (but will not delete them) and go to the next mailbox. Press 9 will cancel message pickup and return to the main user backend menu.

When 4 is pressed the user is presented with additional message options. Pressing 1 will play the date and time of the message to the user in military format (ie. 5 pm is 1700 hours). Pressing 3 will forward this message to another mailbox within the scope of the telephone access number. Pressing 4 will carbon copy the message to another mailbox. The difference between forwarding and copying is that forwarding automatically deletes the message and

advances to the next message while copying does not delete the message and returns the user to the more options menu. Pressing 8 will delete all remaining messages in the current mailbox and pressing 9 will return the user to the message menu.

Pressing 8 will delete all remaining messages in the current mailbox. *BE CAREFUL* when using this selection as all the remaining messages in this mailbox will be deleted without playing the messages first. You will be asked to confirm this selection before all messages are deleted. This option would typically be used if the user has already picked up messages by email and has no further need for them.

**NOTE:** Deleting a message in these menus does not delete the message received by email notification, regardless of whether it is a voice mail message or fax.

## **Fax Messages**

When checking for fax messages you will hear the number of faxes that have been received into the current mailbox followed by a special fax menu. Fax messages can be sent to your main fax number or any local or toll free fax number. This allows the convenience of receiving a fax wherever you may be. Faxes delivered in this way will not be deleted automatically. Use option 4 to delete all fax messages in the current mailbox but please be sure that you have received all faxes before doing so, or that you have already received your faxes by email. Deleting faxes in the message menu *does not* delete faxes received by email.

When sending your faxes to your main or another fax number they are always queued three at a time. This is done to reduce the chance of transmission errors and retries when the fax documents consist of many pages. Faxes are queued immediately and are delivered to the specified email as soon as possible, usually right away.

This method of retrieving faxes is offered as a secondary method to receiving faxes by email. The user will find that receiving faxes on email is by far the more convenient way of receiving faxes but since an Internet and email connection may not always be available this method is provided as an alternate way to retrieve faxes.

## **Recording Greetings**

From the user backend main menu the user may record all their greetings by pressing option 2. All greetings are recorded in the same way and may be re-recorded as needed. Each user should at least record a main greeting and short greeting for each mailbox. If no main greeting is recorded a generic mailbox greeting will be played in its place.

Follow these instructions to record all greetings:

1. Press 2 from the user backend main menu
2. From the Recording Menu, select the option for the greeting you wish to record (see below)
3. To record the selected greeting, press 1 again to begin recording
4. The service will prompt with "Begin recording at the tone" followed by a brief beep.
5. Begin recording your selected greeting. When you are finished recording press 1 again and your greeting will be played back to you.
6. If you are happy with your greeting then press 1 to save it. If you wish to re-record it press 2 and go back to step 4. To hear the greeting again before saving press 3 or if you wish to cancel recording press 9.
7. If you pressed 1 to save the greeting or 9 you will be returned to the previous menu.

### **Option 1 – Main Greeting**

This is your default Main Greeting that will be played when callers access this mailbox, unless another greeting has override priority.

### **Option 2 – Temporary Main Greeting**

This greeting may be recorded to override your main greeting temporarily. By deleting this greeting your mailbox will revert to the main greeting recorded under option 1. This greeting is provided so that user may record a

special greeting if they are going to be out of town or on vacation or for any special notification such as the time of a teleconference, without having to re-record the main greeting.

### **Option 3 – Short Greeting**

This greeting is used in conjunction with the Name Search function from the main introduction on any telephone access number. Typically all that is required here is the person's name and the extension mailbox number. (i.e. "John Doe – extension 1500"). When callers use the name search function they will hear this greeting when this mailbox is matched to a search.

### **Option 4 – After Hours Greeting**

This greeting will be played if recorded and the user has defined the business hours for this account in the web site Self Care section. The greeting is played when the current time is outside of the specified business hours and has priority over all other greetings when the mailbox box is in after hours mode.

### **Option 5 – Custom Mailbox Menu**

The user can record a custom mailbox menu for this mailbox using this option. When a caller presses the pound key during a greeting or enters an invalid mailbox option, this menu will be played in place of the default mailbox menu. Record this option when you want the menu to be in your voice or if you want to present only some of the mailbox options available. The mailbox options recorded must match the ones in the generic menu exactly. For example, you cannot make option 1 on the menu for receiving faxes; it must always be option 3, etc. See the section entitled "Caller Front-end" for a detailed description of each option available and the requirements for each option.

## ***Changing your Pass Code***

From the user backend menu you may press 3 to change your pass code. This operation changes your pass code for access to the user backend and for the web site Self Care section for this account. You must complete the entire procedure to change your pass code. You may press the star key to cancel this operation at any time. Enter the new 4 digit pass code for this account. When prompted, re-enter the 4 digit pass code for this account. Once entered, the change will be confirmed. If an error occurs during entry (such as too few digits or if the pass code re-entry does not match) the operation will be cancelled and the pass code will not be changed.

## ***Changing your forwarding***

From the user backend you may press 4 to change your call directing. If forwarding is currently active then you will hear to which number your forwarding is currently being re-directed. You will then hear the options to change your forwarding to your office (option 1), to your cell phone (option 2), to your home (option 3) or to stop forwarding calls (option 4). You may cancel and return to the previous menu by pressing 9. Once you have entered an option from 1 to 4 you will hear a confirmation message for the new forwarding number and then be returned to the user backend menu.

In order for this feature to work correctly, the user must have entered valid local or toll free numbers for one or more of the 3 available slots. These phone numbers can be managed from the web site self care section.

NOTE: The phone numbers entered can be any valid local or toll free number and not necessarily the user's home, work or cell phone numbers respectively.

## ***Quick Conference***

You may start a teleconference directly from the main menu by pressing 5. If a teleconference is already in progress you will be joined to the existing conference call. See the section on teleconferencing for more details on this feature.

## ***Advanced Options***

The advanced options menu is accessed by pressing 5 from the user backend main menu. The options on this menu are less likely to be used as frequently as those on the main menu and are therefore presented on a separate menu. The two main features of advanced options are teleconferencing and loadable “Fax Hot Sheets” for fax back. More options may be added to this menu in the future.

### **Teleconferencing**

See the section on *Teleconferencing* further on in this guide for details on how to use this feature.

### **Fax Hot Sheet**

Every mailbox has the ability to load a “Fax Hot Sheet” for a fax back. This sheet could be product information, promotional offers or application forms, to name a few, and can be updated as often as needed. Once loaded, callers may request the Hot Sheet by using option 4 in the mailbox greeting and entering their local or toll free fax number.

To load a Fax Hot Sheet you must call from a fax machine with the document ready to fax. If you are calling from a fax machine then you can manually dial into the service and get into the user backend to load the fax. If you are calling from a computer based fax then you can dial manually or program the entire sequence of touch-tones from beginning to end to get to this menu option. For example, the entire dialing sequence may look like this:

**“9056312140,,1500,\*1234,5,3,”**

This dials the access telephone number followed by the mailbox extension, then the pass code and finally the advanced menu option 5 then 3 to load the Fax Hot Sheet. The commas create pauses in the dialing making the sequence more reliable and allowing the user to hear what is happening on the line. The user would substitute their own mailbox, pass codes, etc. in the example above

Regardless of how you choose to do it, once the last option 3 is pressed you will hear “Press the start button on your fax now..” followed by the fax tone. At this point you would send your fax. If the fax is successfully received it will be automatically updated to the mailbox as the current Fax Hot Sheet. If a transmission error occurred while receiving the fax the Hot Sheet will not be updated and must be loaded again. The user should verify that the correct Fax Hot Sheet is loaded by requesting the fax after it is loaded.

## **Receiving Messages by Email**

### ***Introduction***

One of the most important and powerful features of the Unified Messaging platform is the ability to receive messages and notifications by email. Every mailbox has the ability to receive messaging on up to 3 email addresses. Every mailbox will send notification on the user’s primary email address plus up to 2 additional email addresses, which may be different for every mailbox. This service accepts ***any valid email address*** for notifications and notifies all email addresses every time a message is received.

As an example, let’s suppose the user has a main email address with his or her high-speed Internet service provider at home. This would be designated as the primary email address for the account. In addition, the user has a cell phone with an active email address for receiving text messages and a web based email address with one of the many popular services available free of charge. The user could program one or both of these email addresses into the mailbox settings in the web site Self Care section. Now every time the voice mailbox receives a fax or voice mail message, all three email addresses will receive the same notification. The user could be at home, in the car or half way around the world and still receive all messages via email. This feature could effectively double as an E-paging service, although traditional pagers are supported as well for fastest notification.

## ***Voice Mail***

When receiving notification of a voice mail message the user will receive an email message with the subject line similar to:

**“Voice Mail from <caller id/Anonymous> to MB# <mailbox>”**

If the user is on an Internet device which can play wave files (such as a computer or laptop) with a minimum 56K Internet connection, then they may click the link to the voice mail message in the body of the voice mail and hear the message immediately. A good quality 56K Internet connection is required for this feature (high speed Internet is highly recommended). Depending on the quality of the connection and the number of hops to our servers the play back may be “choppy” if using a 56K or slower connection. If the play back stops and start simply allow the message to stream to your device, then you can replay it smoothly as it will be buffered locally. The device used to play the message must support WAVE files and have speakers or headphones attached. To this end, most computers come with this ability pre-installed and many WAVE players are available free of charge on the Internet.

You may also download the message for a permanent record stored in your computer. You may do this in most email programs by right-clicking the link and choosing the “**Save As**” or “**Save Target As**” option from the pop-up menu, and entering a local file name to download the message to, or just use the filename given in the save dialog. Changing the name of the downloaded file is recommended to give a better meaning to the content of the voicemail.

## ***Fax Mail***

When receiving notification of a fax message the user will receive an email message with the subject line similar to:

**“Fax Received from <caller id/Anonymous> to MB # <mailbox>”**

If the user is on an Internet device (such as a computer or PDA) that has a graphical Internet browser (like Internet Explorer or Netscape), then they may click the fax link in the body of the email message to display the fax in the Internet browser. *Any* Internet connection is sufficient for this feature. The browser must have Adobe Acrobat Reader installed ( or compatible software). If this is not installed click the link to the reader in the body of the email. This will take you to the Adobe web site where you can choose your operating system and download the program free of charge.

The fax will appear in your browser window. You may view or print the fax (if a printer is available). You may also download the fax to the computer for a permanent record by right-clicking the fax link and choosing the “**Save As**” or “**Save Target As**” option from the pop-up menu, and entering a local file name to download the message to, or just use the filename given in the save dialog. The fax will be saved locally as a PDF file (portable document file). Changing the name of the downloaded file is recommended to give a better meaning to the content of the voicemail.

## ***Organizing Your Messages***

We recommend that you use an email program that is capable of filtering and sorting emails as they come. Most computers come with such a program installed (i.e. Outlook Express), and so do most web based email services.

To automatically filter and sort your incoming mail create a folder for receiving voice mail and another for faxes. Name them meaningful names such as “**Voice Mail**” and “**Faxes**” respectively. In your email program there should be a tool to create email filters.

For example, if you are using Outlook Express from Microsoft then click on ‘**Tools**’ followed by ‘**Message Rules**’ and then ‘**Mail**’. This will open a dialog for creating email filters. Click on the ‘**New**’ button and create a new filter which sorts incoming mail with the words ‘**Voice Mail**’ in the subject line and moves these messages automatically to a folder called ‘**Voice Mail**’. Similarly, create another rule which sorts incoming email with the words ‘**Fax Received**’ in the subject line and moves these messages to a folder called ‘**Faxes**’.

Creating these mail sorts and filters will greatly reduce the time it takes to read messages and makes finding older messages much easier. Consult the documentation for your email program to determine how to set up email filters to sort your incoming messages. In addition these filters can be used to sort all type of email messages using different rules.

## Internet Website Self Care

### Logging In

The Mercuri.ca website features a Self Care section for users of the Unified Messaging Service. To access Self Care you must be a subscriber to one of the Unified Messaging packages and have access to an Internet connection and web browser (graphical). Visit the website [www.Mercuri.ca](http://www.Mercuri.ca) and click on Self Care from the menu bar. Click again on the **'Pro Voice'** Self Care icon. You will now be presented with a login screen similar to the figure below.



The screenshot shows a Microsoft Internet Explorer browser window displaying the Mercuri ProVoice Login for Selfcare page. The browser's address bar shows the URL <http://www.mercuri.ca/selfcare/default.asp>. The page features the Mercuri e-Mobility Corporation logo at the top. Below the logo, the heading "ProVoice Login for Selfcare" is displayed. A message instructs the user to enter their login information and click the Login button. The login form includes three input fields: "Access Phone Number" (with "805-631-" pre-filled), "Primary Mailbox Extension", and "Passcode". A "Login >>" button is positioned below the fields. At the bottom of the page, there are three links: "Go Back", "Home", and "Selfcare Home".

Enter your telephone access number if it is not already there. If you have subscribed to a Private Number package then you must enter your 10-digit private access telephone number, area code first. Enter the first mailbox in your account in the 'Primary Mailbox Extension' field. This is optional if your access number is direct dial to your mailbox extension. Enter your 4-digit pass code next to 'Passcode'. Finally click the **'Login'** button to login. If successful, you will be presented with your accounts main screen. If unsuccessful you will be asked to try again.

## Account Information Page

**Account Information**

Company: XYZ Corp.  
Address: 123 4th Ave  
City: Burlington Province: Ont Postal Code: A0A 0A0

Contact Name: John Smith

Work Phone: 9053153333  
Cell Phone: 9054661000  
Home Phone: 9053151234  
Pager: 9054662565  
Fax: 9053154444

Currently Forwarding to: Cell

Paging hours are set from 9 am to 5 pm

Business hours are set from 8 am to 8 pm

Search Name: Smith, John

Primary Email Address: JSmith@XYZCorp.com

[Manage Account](#)

[Manage Account](#)

Mailbox #	Type	Name Search	Paging	2nd Email	3rd Email
1004	Voice/Fax	Yes	Yes	9054661000@yourmobile.com	JohnSmith2002@yourwebmail.com
1005	Fax	Yes	No	myemail@myPDAlsp.com	
1006	Voice/Fax	Yes	No		
1007	Fax	Yes	No	JohnsMail@HighSpeed.net	
1008	Fax	No	Yes		

[Manage Mailboxes](#)

[Home](#) | [Selfcare Home](#)

The top half and bottom half of the Account Information page is shown above in two separate screens. On this screen you will see all your account information at the top of the page and the mailbox settings for all your mailbox extensions at the bottom of the page. You may review all of your account information and current settings here. To manage your account information you may click on '**Manage Account**'. To manage your mailbox settings you may click on '**Manage Mailboxes**'. Account information applies to all mailboxes while mailbox information applies to information stored for each mailbox separately.

## Manage Account

### Phone Numbers and Forwarding

The Account Management screen will appear similar to the figure below. You may change all other phone numbers as needed. Enter any new telephone number as 10-digits, area code first. To have calls redirected to a specific phone number when a caller presses zero in your mailbox greeting, simply fill out the '**Zero Out To**' box with a local or toll free number, area code first.

You may change the current forwarding number by selecting the phone number from the drop down next to '**Currently Forward To**'

### Paging and Business Hours

Set your paging hours as needed. The service will only page you automatically for message notification during these hours. E-paging is not affected by this setting. The paging feature must be enabled for each mailbox and a pager number or SMS e-mail address must be programmed in Self Care for the service to page when that mailbox receives messages.

Set the business hours for your account by selecting the start and stop times for your business day. When your account is in after hours mode, the after hours message will automatically play to all callers, if it has been recorded. You may choose to set the times where the start time is after the stop time. When this is done the hours of operation are considered to be over midnight to the next day. For example, if you set the hours of operation from 9 pm to 5 am then your operation hours will be from 9 pm at night over midnight to 5 am in the next morning. This would be an unusual setting but it is allowed to encompass all possible situations, such as overseas concerns or businesses with unusual hours of operation..

## Search Name

You may update your Search Name on this screen as well. This is the name that is used when callers perform a name search to attempt to find a mailbox that belongs to you.

When all changes are complete, click on 'Update' to save your changes. All changes take immediate effect.

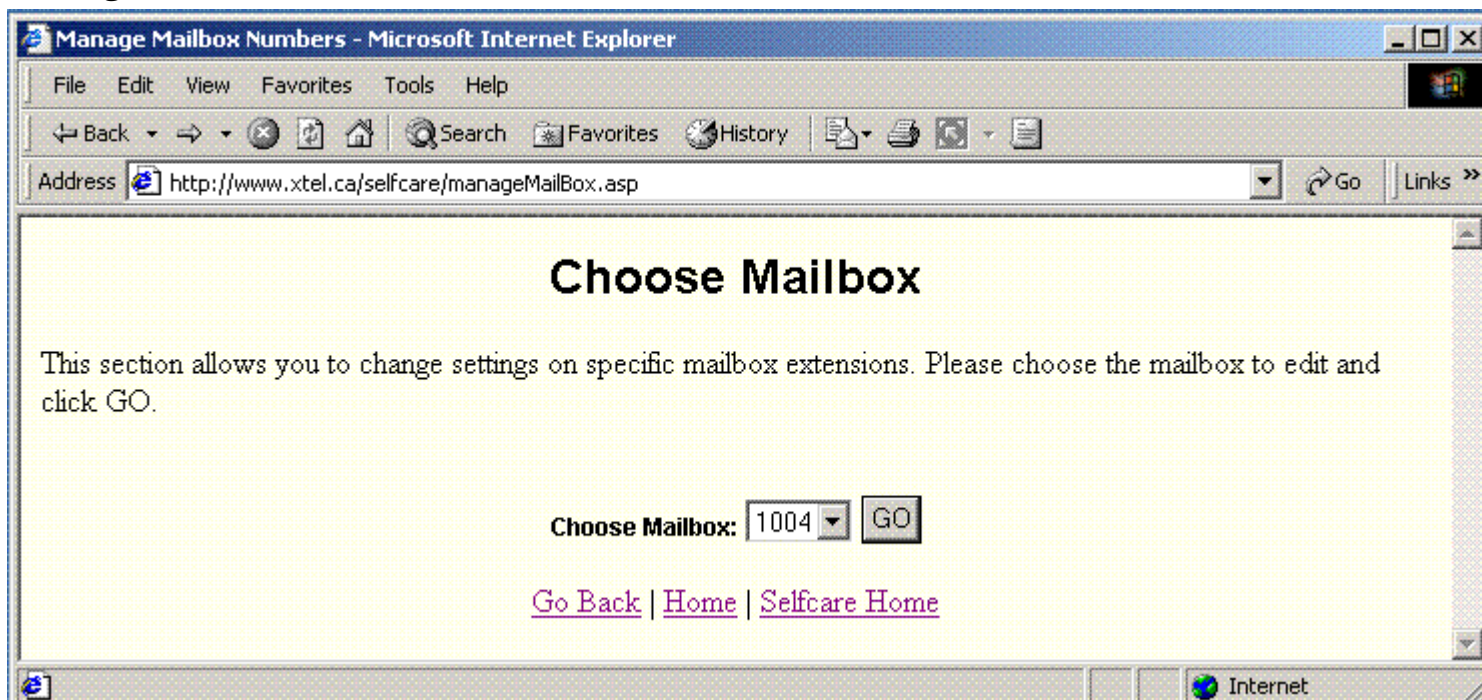
**Account Maintenance**

Please review and make changes to your phone numbers and settings as needed. When complete, click Update to save your changes.

<b>Main Phone (Work):</b>	<input type="text" value="9056312100"/>
<b>Cell Phone:</b>	<input type="text" value="9054671234"/>
<b>Home Phone:</b>	<input type="text" value="9055551212"/>
<b>Pager or SMS Email:</b>	<input type="text" value="9054640000"/>
<b>Fax:</b>	<input type="text" value="9056312106"/>
<b>Zero Out Option to:</b>	<input type="text"/>
<b>Currently Forwarding to:</b>	<input type="text" value="Cell"/>
<b>Paging hours are set from:</b>	<input type="text" value="8"/> <input type="text" value="am"/> to <input type="text" value="10"/> <input type="text" value="pm"/>
<b>Business hours are set from:</b>	<input type="text" value="8"/> <input type="text" value="am"/> to <input type="text" value="6"/> <input type="text" value="pm"/>
<b>Search Name:</b>	<b>Last name :</b> <input type="text" value="Smith"/> <b>First name:</b> <input type="text" value="John"/>
<b>Primary Email:</b>	<input type="text" value="John.Smith@xyz.com"/>

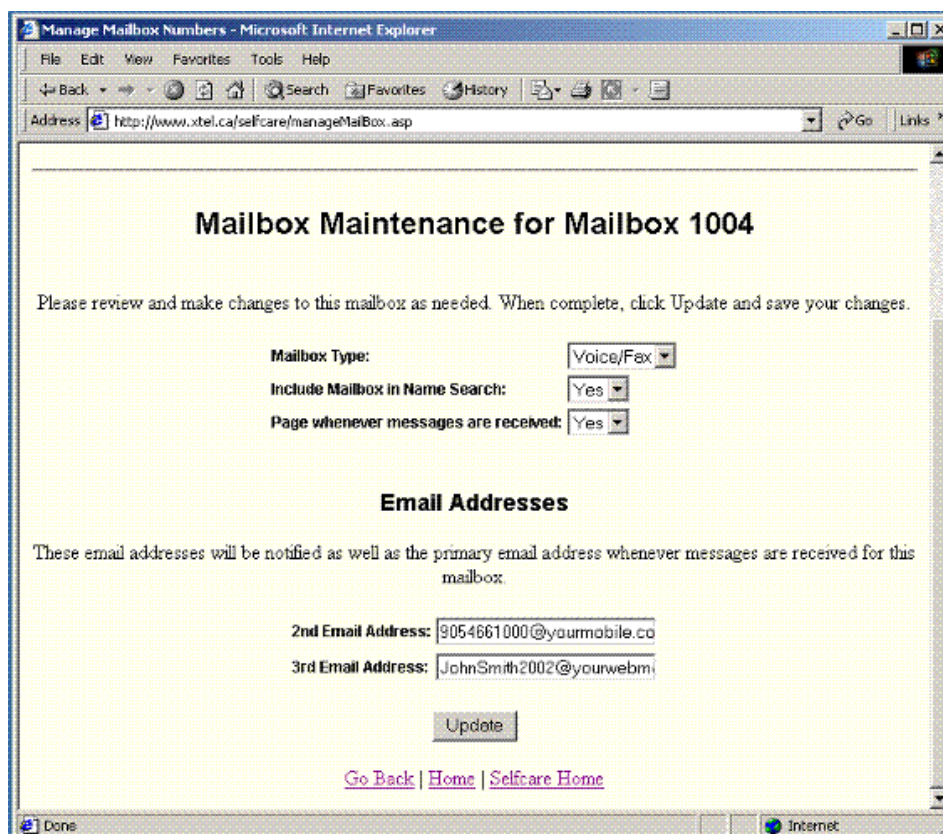
[Go Back](#) | [Home](#) | [Selfcare Home](#)

## Manage Mailboxes



When you click the 'Manage Mailboxes' button from the 'Account Information' screen you will be asked to choose a mailbox to manage and then click 'GO'. Once you have selected a mailbox the bottom of the screen will fill in with the mailbox information. You may select another mailbox at any time and click 'GO'. Always click 'Update' to save your changes before choosing another mailbox. Your changes will take immediate effect.

## Update Mailbox Information



From the Mailbox Maintenance screen you may change the mailbox type from **Voice and Fax** to **Fax Only**. Setting a mailbox to **Fax Only** will cause the service to receive a fax immediately after the mailbox extension is entered from the main introduction. The caller will not hear any mailbox greeting.

You may set each mailbox to be included in name searches or not. If you want the mailbox to be included in name searches then set this to **Yes**. All mailboxes in an account will use the same search name so you may wish to only set one mailbox to be available in the name search function.

You may set each mailbox to page your pager every time a message is received. A pager phone number must be entered in the **Manage Account** screen for this feature to work. You may also set automatic paging times for all mailboxes in this account in the **Manage Account** screen.

Finally you may set up to two additional email accounts for each mailbox to receive email notifications and messaging. The primary email address on this account will always receive email notifications and messaging for all mailboxes in the account. These extra email addresses allow for multiple notifications and flexibility in the set-up of your service. The 2<sup>nd</sup> and 3<sup>rd</sup> email address may be different for each mailbox. The primary email address may only be changed by calling customer service.

## **Private Number Set-up**

### ***Introduction***

If you have subscribed to one of the Private Number packages then you have several extra features available to you. You will be able to record your own main introduction as well as a company directory message and general company information. The main introduction will be played immediately when a caller dials your private access number and the company directory and general information message are accessible directly from the main introduction. You may also specify a mailbox to be designated as your reception extension. Callers will automatically be directed to this extension if they press zero or enter nothing at all. Callers will automatically be able to send faxes to you from the main introduction by pressing a single touch tone digit. Faxes will be delivered to the reception mailbox. As a subscriber to a Private Number package you may also select your service to use 3 digit extensions or 4 digit extensions.

### ***Recording an Introduction and Other Messages***

If a custom introduction has not been recorded then the generic introduction is played in its place. To access the recording menu press the pound key (“#”) from the main introduction followed by your 4-digit pass code. This pass code is different from any mailbox account pass code and will be given to you by your customer service rep. You will be asked to enter your customer id as an extra security precaution. Your customer service representative will give this to you. Enter your customer id, followed by the pound key.

If you wish to have your main introduction and other messages recorded professionally then contact customer service for rates and information.

Choose the message you wish to record. Press 1 for the main introduction, Press 2 for the company directory message or press 3 for the general company information message. The rest of the recording menus are very similar to the mailbox recording menu as described in the section on the ‘User Backend’. See ‘Recording Greetings’ in this section.

### **Main Introduction**

The user may record anything he or she likes for a main introductory message, using the examples below as a guideline. If the user will be employing any of the features such as company directory or fax the options must be presented to the caller using the same touch-tone digits as below.

## **Sample 1 – Full Introduction**

“Hello and thank you for calling <your organization>, if you know the extension of the person you wish to reach you may enter it at any time, for a company directory press 7, for company contact and general information press 8, to send a fax press 9, to search by name press the star key. For reception you may press 0 or hold the line...”

## **Sample 2 – Only Some Features Used**

“Hello and thank you for calling <your organization>, if you know the extension of the person you wish to reach you may enter it at any time, for a listing of department extensions press 8, to search for an extension by name press the star key. For reception you may press 0 or hold the line...”

## **Company Directory**

The user may record the names and mailbox extensions of key departments and individuals, fax lines and emails in this message or any other information that the user wishes to provide to the caller.

## **General Information**

The user may record any additional company information. This may include the address and directions, telephone numbers, fax lines and emails or any other information the user wishes to inform callers about.

## **Dedicated Fax Telephone Number**

As an additional option the user may subscribe to a dedicated fax line for receiving faxes. This dedicated fax number will behave like any fax machine to a caller sending a fax. Faxes are delivered to up to any 3 email addresses of the user’s choice or optionally to a mailbox extension of the user’s choice (using the 3 email addresses set-up in the mailbox). If the former is selected then faxes will only be delivered by email and not to a mailbox extension as well. A dedicated fax line may be purchased on its own separate from any other package or bundled with one of the subscription packages. The dedicated fax line can give an organization a professional polish without the need to install separate fax lines and purchase a fax machine, ink and paper.

## **Teleconferencing**

### ***Introduction***

Teleconferencing is used when 3 or more people need to talk to each other at the same time. Every mailbox has the teleconferencing feature built into it and is available to use at any time. A teleconference may be initiated from the user backend only. Callers may join the teleconference by using option 5 from the mailbox greeting. The user may record a special greeting for the callers to hear, informing them to press 5 to join the conference, or simply instruct them to press 5 while listening to the mailbox greeting. Every account may start a teleconference at any time and any mailbox belonging to that account may join the teleconference. In the case of the Private Number packages, an organization could have multiple teleconferences running at the same time under different user accounts within the package.

Callers may join into the teleconference any time after the user has started the conference. Callers may leave the conference and then rejoin as well. The user is always in complete control of the conference and may end it at any time simply by hanging up. When the user hangs up, all remaining callers are automatically disconnected and may no longer rejoin the teleconference.

### ***Billing and Charges***

The teleconferencing service is billed separately from the rest of the account billing. The user is charged *per caller and per minute* for use of teleconferencing services. For example, if 6 people are using teleconferencing for 30 minutes then 180 minutes of time is charged to the user’s account. Check our web site for current rates on teleconferencing.

## ***Starting and Recording a Teleconference***

On the user backend you may press 5 for the advanced options menu. From this menu option 1 will start a teleconference and option 2 will start *and* record a teleconference. Once a teleconference is started you must wait for your parties to join. Parties will join your teleconference by pressing option 5 in any mailbox on the user's account. If you are recording the teleconference then the recording will appear as new voice mail in the mailbox used to start the teleconference. The recording may be broken up into several pieces (voicemail messages), as the recordings can be very large. These voice mail messages will not be delivered by email due to the large size of the recordings. If a permanent copy is required the user may request that the recording be transferred to CD or audiocassette for a service charge. If you wish to receive a permanent copy of the teleconference recording then do not delete the voice mail messages from the mailbox.

# Account Information Page

Print this page and fill out the Account Information for a permanent record.

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Main Phone (Work): \_\_\_\_\_

Cell Phone: Home Phone \_\_\_\_\_

Fax: \_\_\_\_\_ Pager: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Main Access Phone Number: \_\_\_\_\_

4-Digit Pass Code (Private Number Only): # \_\_\_\_\_

Dedicated Fax Number: \_\_\_\_\_

## Mercuri Unified Messaging

Access Number: \_\_\_\_\_

Mailbox Ext: \_\_\_\_\_

Pass Code: \* \_\_\_\_\_

Auto Paging: Y / N Name Search: Y / N

Mailbox Type: Voice & Fax / Fax Only

2<sup>nd</sup> Email: \_\_\_\_\_

3<sup>rd</sup> Email: \_\_\_\_\_

## Mercuri Unified Messaging

Access Number: \_\_\_\_\_

Mailbox Ext: \_\_\_\_\_

Pass Code: \* \_\_\_\_\_

Auto Paging: Y / N Name Search: Y / N

Mailbox Type: Voice & Fax / Fax Only

2<sup>nd</sup> Email: \_\_\_\_\_

3<sup>rd</sup> Email: \_\_\_\_\_

## Mercuri Unified Messaging

Access Number: \_\_\_\_\_

Mailbox Ext: \_\_\_\_\_

Pass Code: \* \_\_\_\_\_

Auto Paging: Y / N Name Search: Y / N

Mailbox Type: Voice & Fax / Fax Only

2<sup>nd</sup> Email: \_\_\_\_\_

3<sup>rd</sup> Email: \_\_\_\_\_

## Mercuri Unified Messaging

Access Number: \_\_\_\_\_

Mailbox Ext: \_\_\_\_\_

Pass Code: \* \_\_\_\_\_

Auto Paging: Y / N Name Search: Y / N

Mailbox Type: Voice & Fax / Fax Only

2<sup>nd</sup> Email: \_\_\_\_\_

3<sup>rd</sup> Email: \_\_\_\_\_

## Mercuri Unified Messaging

Access Number: \_\_\_\_\_

Mailbox Ext: \_\_\_\_\_

Pass Code: \* \_\_\_\_\_

Auto Paging: Y / N Name Search: Y / N

Mailbox Type: Voice & Fax / Fax Only

2<sup>nd</sup> Email: \_\_\_\_\_

3<sup>rd</sup> Email: \_\_\_\_\_

## Mercuri Unified Messaging

Access Number: \_\_\_\_\_

Mailbox Ext: \_\_\_\_\_

Pass Code: \* \_\_\_\_\_

Auto Paging: Y / N Name Search: Y / N

Mailbox Type: Voice & Fax / Fax Only

2<sup>nd</sup> Email: \_\_\_\_\_

3<sup>rd</sup> Email: \_\_\_\_\_