

## Message Manager User Guide

Message Manager is a secure and robust web based portal for viewing message history and status, sending messages, managing your address book, reporting and administrator functionality.

### My Messages

This is the My Messages page where you can view your messages.

#### Options

**Client:** This is the IntelliMessage Client ID.

**Account:** This is the IntelliMessage Client's Primary Account.

**Search:** Enter keywords to find specific messages. All fields in the grid are searched.

**Begin Date/End Date:** Change the date range to see messages within the range chosen. The default begin date is 3 days prior to today and the default end date is today. Change these to limit or increase the number of messages shown. The non-default dates are retained throughout the session.

**Message Status:** All message statuses are shown by default. If you would like to view only certain message statuses, choose from one of the following: Sent Only, Pending, No Device Response.

**Sent Only:** This status will show messages that have been sent to a non-reliable device, such as an email address.

**Pending:** This status shows messages that have popped up on a device to be replied to, but the person has not answered.

**No Device Response:** This status shows when the person has no devices available to respond.

**Auto Refresh:** If this box is checked, the messages grid will update automatically every 30 seconds. This will show any new messages or messages where the status has changed.

**Search button:** Click this button to update the grid after you enter a keyword in the search box.

**Clear button:** Click this button to reset the date range to the default dates, Message Status to All and Search box to blank.

## Messages

The Messages grid shows From, To, Date/Time, Subject/Message, Status and Response. Your personal messages will show along with messages you have sent to others.

To view Message detail, click anywhere in the row for the message you want to view. A popup will be displayed with the detail.

To view the Message Number, hover over the Date/Time with your mouse and the number will appear in a tooltip.

Messages are displayed in blue colored text. If a Message's status is Pending or No Device Response, the font of the Subject, Message and Status will show in red colored text.

Twelve messages are shown at a time. If you want to view more messages, click the paging arrows at the bottom of the messages grid.

Excel button: Click this button to get an excel (xls) spreadsheet export of the contents of the grid. All pages of the grid will be exported, not just the current twelve messages you see.

IntelliMessage Clear Unread Messages button: Click this button to clear all unread messages of the person listed in the Client box. Group Messages will not be cleared and must be cleared individually from the Message Detail popup.

## Admin Only Options

**Client:** If you have access, you can choose a client to view their messages. As you start typing, a list of Clients matching the letters you type will pop down for selection. Alternatively, click the binoculars button to do a search on the list of clients you have access to. From the popup, double click the Client and it will populate the main page with that Client ID and close the popup.

Click the underlined Client label link to reset the Client and Account back to yourself.

**Account:** If you have access, choose an account to view Clients that belong only to that account in the pop down. As you start typing, a list of Clients matching the letters you type will pop down for selection.

## **My Messages > Message History Report**

This is the Message History Report page where you can enter search criteria and then run a report. Once open, you can print the report or export it to PDF, Excel, Word and other formats.

**Client:** If you have access, you can choose a client to view their messages. As you start typing, a list of Clients matching the letters you type will pop down for selection. Alternatively, click the binoculars button to do a search on the list of clients you have access to. From the popup, double click the Client and it will populate the main page with that Client ID and close the popup.

Click the underlined Client label link to reset the Client and Account back to yourself.

**Account:** If you have access, choose an account to view Clients that belong only to that account in the pop down. As you start typing, a list of Clients matching the letters you type will pop down for selection.

**Search Term:** Enter keywords to find specific messages. All fields in the grid are searched.

**Begin Date/End Date:** Change the date range to see messages within the range chosen. The default begin date is 3 days prior to today and the default end date is today. Change these to limit or increase the number of messages shown. The non-default dates are retained throughout the session.

**Message Status:** All message statuses are shown by default. If you would like to view only certain message statuses, choose from one of the following: Sent Only, Pending, No Device Response.

Sent Only: This status will show messages that have been sent to a non-reliable device (such as a one way pager).

Pending: This status shows messages that have popped up on a device to be replied to, but the person has not answered.

No Device Response: This status shows when the person has no devices available to respond.

**Report button:** Click this button to view the report after you have selected your options above.

## Address Book

This is the Address Book screen. When you first reach the screen, you are viewing your Personal Address Book, only viewable by you. This is denoted by the Address Book Type "Client".

On this initial Address List view, you will see one line item/entry for each type of address. This gives you a concise view to easily locate an Email address or Phone quickly, without having to go into the address book detailed view.

The entry types included on the Address List view are Work, Home, Other, Pager, and Mobile. A blank entry will only show in this view if all of the email addresses and phone numbers are blank for the contact.

From the Address List view, click any entry to see the Tabbed Detail View. The tabs are Quick View, Work, Home, Personal, Other, Escalation and Notes.

The Quick View tab contains the most commonly used fields in the address book.

The Other tabs contain much more detailed information about your contacts.

All fields are completely optional except for Display Name, which is a Nickname for your Contact.

### **Field Definitions**

**Address Book Type** - When you choose Client, you are viewing your personal address book contacts.

If you choose Department, a dropdown will be displayed and you can choose to view contacts for each Department you have access to.

If you choose Company, a dropdown will be displayed and you can choose to view contacts for each Company (domain) you have access to.

**Search** - Enter any word(s) to search through your address book. The search will search within the Address Book Type (and Department/Company, if applicable) you have selected.

**Search Dropdown** - The dropdown beside the Search box defaults to "Search All Fields". This means it will search all of the following fields for the term you enter:  
First Name, Last Name, Email Display Name, Email Address (Home, Work, Other, Mobile, Pager), Phone (Home, Work, Other, Mobile, Pager), Company, Department, Job Title, Assistants Name, Assistants Phone

You may also limit which field is searched by choosing another option from the Search dropdown. The current options are Name and Company.

**Delete** - Click delete to remove the address contact from your Address Book. Please note the entire contact will be removed, not just the phone/email you click beside.

**Email (W)** - Work email address - if the field is filled in, you may click the label beside it to Send a Message.

**Email (H)** - Home email address - if the field is filled in, you may click the label beside it to Send a Message.

**Email (O)** - Other email address - if the field is filled in, you may click the label beside it to Send a Message.

**Phone (W)** - Work phone

**Phone (H)** - Home phone

**Phone (O)** - Other phone

## Send Message

This is the Send Message page where you can create a message to send to one or more people. There are several options you may use on this page from basic to enhanced. Please view each link below to determine which view you prefer to use. The next time you visit the page, your preference will be shown automatically.

### Enhanced View

If you would like more Messaging options, click Enhanced View. This view allows you to create your own Groups and Quick Messages. You can also set up Options such as Canned Subjects, Messages and Replies. You can view your Addresses and Messages in a smaller version. Simply click each tab to view these items.

### Enhanced View - Groups

A Group is one or more email addresses stored under one Group name. An example of a Group is your company's Operations Department. You can make a group called Operations and add all of the Operations Team Members to the group so you can send a message to all members at once.

There are two types of Groups - Personal and Company/Department.

Personal groups are your own groups that you set up and only you can see them and use them. Company/Department Groups are set up so that everyone in your Company or Department can view and use the groups.

Once you have set up one or more groups click Personal to view them on the Groups tab. Click Company/Department to view those groups on the tab.

There are two Group Views available- List View and Button View. List View will present the groups to you in a list, while Button View shows one button per group.

Click New to add a new group. Click Edit to edit your existing groups. Click Membership to view a list of groups you are a member of. After adding or editing groups, click the Refresh button to update your Groups view.

Once you have some groups available, you may hover over a Group Button or List and view the Members of that group. You may also click the Group to show a popup and from there you may send a Group Message.

### **Enhanced View - Quick Messages**

A Quick Message is a stored message that may include To email addresses, Subject and or Message Body. It is set up for you to use for messages you send frequently so that you do not have to type them over and over again. An example of a quick message is a "Code Blue" message. You can store the Code Blue Team Members' email addresses, Subject and Message. When you send the Quick Message, it will give you the option to enter more email addresses in addition to the ones stored, if any. You may also add additional text to the message body at the time you send it.

Quick Messages may be set up for Personal use or Account (Department) use.

On the Quick Messages tab, there are two Views available- List View and Button View. List View will present the Quick Messages to you in a list, while Button View shows one button per Quick Message.

Click New to add a new Quick message. Click Edit to change your existing Quick Messages. After adding or editing Quick Messages, click the Refresh button at the bottom of the tab to view your changes.

Once you have some Quick Messages available, you may hover over a Button or List item and view the Quick Message To, Subject and Message. Click the Quick Message Button or List Item to show a popup and from there you may send the Quick Message.

### **Enhanced View - Options**

Current message options include Canned Subjects, Canned Messages and Canned Replies. You may add as many Canned Options as you like by clicking the New button. Edit them by clicking the Edit button. Use the Refresh button at the bottom of the options tab after adding/editing to view your changes. Your canned options will be saved when you check them. The next time you create a message the canned options will still be set and the appropriate boxes filled in (Subject, Message). To clear them permanently, click the Clear All button.

Canned Subjects - check a box beside Canned Subject to add it to the Subject box. If your subject box is closed, the subject will not be sent with the message. You may use more than one Canned Subject at a time.

Canned Messages - check a box beside Canned Messages to add it to the Message box. You may use more than one Canned Message at a time.

Canned Replies - check a box beside Canned Replies to include it as a button on your message (button will show on PC Desktop, iOS and Android devices). You will not see the button, but it will be created when the recipient receives the message. You may use up to 4 Canned Replies at a time.

### **Enhanced View - Addresses**

This tab shows a condensed view of your address book. It also includes your Groups and Quick Messages. The Type Column tells you if it is an Address Book Entry, Group or Quick Message.

Hover over the Name column in each row with your mouse to view pertinent info in a popup. Move your mouse off of the row to close the popup automatically. In rare instances, the popup may stay open. Click the x to close it.

Click the Edit button to the right of the Type Column to edit the Address Book Entry, Group or Quick Message.

Click anywhere else in the row and the To box will be populated with the Email Address in the row.

Use the Search box at the top to find a specific Address Book Entry, Group or Quick Message in the list. Your Personal Address Book entries are displayed initially. Click Global Address List to view Group and Company Address Entries.

Click the Address Book button at the bottom of the Addresses tab to go to your full Address Book.

### Enhanced View - My Messages

This tab shows a condensed view of your Messages.

Click anywhere in the row to view Message Detail.

Use the right/left arrow button to page through your messages.

Click the Search link to open the search box and search for a specific message.

### Address List View

The Address List shows a condensed view of your address book. It also includes your Groups and Quick Messages. The Type Column tells you if it is an Address Book Entry, Group or Quick Message.

Hover over the Name column in each row with your mouse to view pertinent info in a popup. Move your mouse off of the row to close the popup automatically. In rare instances, the popup may stay open. Click the x to close it.

Click the Edit button to the right of the Type Column to edit the Address Book Entry, Group or Quick Message.

Click anywhere else in the row and the To box will be populated with the Email Address in the row.

Use the Search box at the top to find a specific Address Book Entry, Group or Quick Message in the list. Your Personal Address Book entries are displayed initially. Click Global Address List to view Group and Company Address Entries.

Click the Address Book button at the bottom of the Addresses tab to go to your full Address Book.

### Basic View (Sending a Message)

When you first enter the Send Message page, you will see the Basic View, which includes the Send Message Template (To and Message with Send button) and My Messages.

To send a message, enter the To email address(es), separated by semicolons or commas. Enter your Message and then click the Send button. Check the **Auto** box under the message label to show a popdown of your previously used messages as you type the message.

Subject is available for use by clicking the Subject link, but if you prefer to use only the Message body for your message simply keep the Subject closed. Check the **Auto** box under the subject label to show a popdown of your previously used subject as you type the subject.

Use the Clear button to blank out the To, Subject and Message fields. If you use Canned Options in the Enhanced View, click the Refresh button to put your canned text options in the boxes.

When typing your message, be mindful of the character limitations of the device type you are sending to. Click the ? beside Characters Entered for more info. As you type in the Subject and/or Message box, the Characters Entered will be shown here.

To view your Messages, click the My Messages link at the bottom of the page.

## **Admin Tools > Client Information**

This is the Client Information page where you can create new clients or update existing client information.

### **Admin Only Fields**

**Client:** If you have access, you can choose a client to view their Client Information. As you start typing, a list of Clients matching the letters you type will pop down for selection. Alternatively, click the binoculars button to do a search on the list of clients you have access to. From the popup, double click the Client and it will populate the main page with that Client ID and close the popup.

Click the underlined Client label link to reset the Client and Account back to yourself.

**Reply Notification Email:** If you enter an email here, you will receive a message at this address when YOU reply to someone's message. (Not when someone replies to your message).

**Client Type:** The options are Client and Group. Group should only be used for message groups and is set up automatically behind the scenes.

**Changed Password:** This means the client has changed his password at least once before.

**Logged In At Least Once:** This flag means the user has logged into IntelliMessage at least once.

**Force Password Change:** If this is "Yes", the client will be forced to change his password upon next login.

**Sent To Billing:** This flag means the client information has been sent to billing and the billing processed correctly.

**Deleted From Billing:** (Future use). This flag means the client information has been deleted from billing.

**Do Not Create Auto Reply:** When clients use the ## function in send message, the message will create a button called Create Reply and the client that receives the message can click this and go to the Send Message to reply with a message back. If the Do Not Create Auto Reply box is checked, and the client puts in ## it will not create the Create Reply button. This checkbox is used for setting permissions for that capability.

**Clear Message By Device:** This is used for the IntelliAlert functionality.

### Fields

**Client:** This is the IntelliMessage Client ID.

**Status:** This is the client's current status.

**Account:** This is the client's Primary Account. When logging in, this is the default account used.

**Active:** This is the client's status in IntelliMessage. Clients can be Active or Inactive.

**Primary Email:** This is the client's primary email address. All email communications from the system will be sent here (Send Password, Forgot Password, etc.).

**Archive Notification:** If you enter an email here, you will receive a message at this address when YOU receive someone's message. (Not when someone receives your message).

**Copy All Messages:** When you enter an email address here, it adds it as a new active device (Email Device type) for the client. In the User Device Description, Forward All Messages Email1 will be displayed.

**Archive All Messages:** When you enter an email address here, it adds it as a new active device (Email Device type) for the client. In the User Device Description, Forward All Messages Email2

will be displayed.

**Time Zone:** This is the client's time zone. All date/times throughout the system are converted and displayed in this time zone for the client.

### **Buttons**

**Add New Client:** Click this to put the page in add mode. Add the required fields (denoted with \*) and click save. Please note: After you enter a First and Last Name and choose the Account, a Client ID will be automatically created. After it is displayed in the textbox, you may change it. The format that comes up initially is the default Client ID for the Account.

**Change Client Info:** Puts the fields in edit mode so you can make changes. When changes are complete click save. Click cancel to return to display mode without saving your changes.

**Change Password:** Takes you to the change password page.

**Send Password:** Sends the password to the currently selected client.

**Status:** Redirects you to the status page.

## **Admin Tools > Devices**

This is the Devices page where you can view your devices and device activity. You may also edit select information about your device by clicking on a row to view the editable popup.

### **Grid Fields**

**Test Push:** A link to send a test push to your device will show here if your device is logged in, active and uses C2DM, Xtify or APNS push service.

**Device Type:** This shows the device type code for the device.

**Device Description:** This is user defined description of the device.

**Application Version:** This shows you the current version you are using.

**Device #:** This is the device # for billing purposes.

**Device Cap Code:** This is the device cap code for billing purposes.

**Last Message:** This is the last date and time a message was in the queue for this device.

**Last Check:** This is the last date and time your device checked to see if an unread message has been answered on another device.

**Last Poll:** This is the last date and time the long polling ran on your device.

**Last Push:** This is the last date and time the server pushed to your device.

**Last Receipt:** This is the last date and time a message was displayed on your device.

**Last Reply:** This is the last date and time you replied to a message on this device.

**Logged In:** This flag denotes whether the device is currently logged in or not.

**Active:** This flag denotes whether the device is currently active or inactive.

## Admin Tools > Change Password

This is the Change Password page where you can change your password. If you are an Admin, you may change others' passwords as well.

Please note changing your password here changes your password for all of your IntelliMessage devices.

**Client:** If you have access, you can choose a client to change their password. As you start typing, a list of Clients matching the letters you type will pop down for selection. Alternatively, click the binoculars button to do a search on the list of clients you have access to. From the popup, double click the Client and it will populate the main page with that Client ID and close the popup.

Click the underlined Client label link to reset the Client back to yourself.

**Current Password:** The first step in changing your password is to enter your current password. If you are an admin changing another client's password, enter your own current password.

**New Password:** Enter your new password. If you are an admin, enter the client's new password. For security purposes, the password must contain at least 1 capital letter, 1 number and be at least 8 characters in length.

**Confirm Password:** Enter the same password you entered for the New Password. This is to ensure you entered what you intended to enter since passwords are hidden with asteriks when typed.

## Admin Tools > Send Password

This is the Send Password page where you can send your current password to your Primary Email Address on file. If you are an Admin, you may send others' passwords to your Primary Email Address on file in order to assist them with the system.

**Client:** If you have access, you can choose a client to send their password. As you start typing, a list of Clients matching the letters you type will pop down for selection. Alternatively, click the binoculars button to do a search on the list of clients you have access to. From the popup, double click the Client and it will populate the main page with that Client ID and close the popup.

Click the underlined Client label link to reset the Client back to yourself.

**Send Password:** Admins Only: Check this box if you want to send the client password to your Primary Email instead of the client's Primary Email. Your primary email address is listed in bold.

**Send button:** Click the send button to send the password immediately.

## Admin Tools > Client Emergency Buttons

***\*This is a future enhancement.\****

This is the Client Emergency Buttons page where you can set up your personal Emergency Buttons that will be displayed on your devices.

**Client:** If you have access, you can choose a client to send their password. As you start typing, a list of Clients matching the letters you type will pop down for selection. Alternatively, click the binoculars button to do a search on the list of clients you have access to. From the popup, double click the Client and it will populate the main page with that Client ID and close the

popup.

Click the underlined Client label link to reset the Client back to yourself.

**Emergency Button Label 1 - 3:** Enter the label you want to show on the Emergency Button on your device. Each button label corresponds to the number beside it. Button Label 1 will call button number 1.

**Button Number 1 - 3:** Enter the phone number you want your device to call when the button is pressed.

## Admin Tools > Client Accounts

This is the Client Accounts page where you view what accounts the Client has access to or if they are an Admin for the account. You can also add or remove a client to an account.

### Options

**Client:** If you have access, you can choose a client to view their account(s). As you start typing, a list of Clients matching the letters you type will pop down for selection. Alternatively, click the binoculars button to do a search on the list of clients you have access to. From the popup, double click the Client and it will populate the main page with that Client ID and close the popup.

Click the underlined Client label link to reset the Client and Account back to yourself.

**Account:** If you have access, select an Account to view just the Clients in the Client popdown.

**Search:** Enter keyword(s) and click search. The following fields are searched: Account, Description, Primary Contact Name.

**Show Allowed Accounts Only:** Check this to view only the accounts the selected client has access to.

### Grid Fields

**Allowed:** If checked, the selected client is a member of the Account.

**Account:** Account Code for the account.

**Description:** Full Account Description for the account.

**Primary Account:** If checked, this is the selected client's primary account.

**Account Admin:** If checked, the selected client is an Account Admin for the account.

**Domain:** This is the domain name of the account and used when setting up new clients to create their client ID.

**Primary Contact:** Primary Contact's first and last name for the account.

**Primary Phone:** Primary contact's phone number for the account.

**Primary Email:** Primary contact's email address for the account.

## **Admin Tools > Change Current Account**

This is the Change Current Account page.

When you first log in to the system, your Current Account is your Primary Account. Every page you go to will default to the Current Account.

If you would like to use a different account as your Current Account for your current session, click the Account you want to view below.

This is only for the current session and does not permanently change your Primary Account.

### **Options**

**Search:** Enter keyword(s) and click search. The following fields are searched: Account ID, Description.

## **Admin Tools > Import Clients**

This is the Import Clients page where you can create several Client IDs at once using an excel template.

Download the template from Tools --> Downloads --> Download Import Clients Template

After you have filled it out, save it to your computer and then follow the steps below.

### **Spreadsheet Fields**

**Company Account ID:** The new Client's Primary Account ID.

**First Name:** The new Client's First Name.

**Last Name:** The new Client's Last Name.

**Primary Email Address:** The new Client's Primary Email Address, usually the business email.

**Pager Number:** The new Client's pager number.

**Send Invitation:** If you enter Y, an email invitation will be sent to the new Client's Primary Email after they are created. If you do not want the Client to receive this email, enter N in the Send Invitation field in the spreadsheet.

**Client ID Default Name:** If you have a specific Client ID you want this new Client to have, enter it here. Otherwise, leave it blank and a Client ID will be created automatically. Example:  
jane.doe@intellimsg.net

**Client ID Optional Pager:** If you have a specific pager Client ID you want this new Client to have, enter it here. Otherwise, leave it blank and a Client ID will be created automatically. Example:  
123456789@intellimsg.net

**Initial Password:** This is the Client's first password which they will change when they log in for the first time. The password must contain at least 8 characters, 1 capital letter and 1 numeric digit. If you leave this field blank, the system will generate a random password for you.

**AccountId1 - 6:** This is a subaccount ID for the Client. For instance, if the Company Account ID is AMS, the subaccount ID could be Sales, Accounting or other subaccounts depending on what the Account has set up. Example: If the Company Account ID is AMS and the AccountId1 is Sales, the client will belong to both accounts, with AMS being his primary account. AMS and AMS|Sales would be the two accounts he belongs to. If you want the Client to ONLY belong to the Sales department, set his Company Account ID to AMS|Sales.

## Steps

**Step 1:** Click Browse or Import File (depending on your browser) and find the spreadsheet you filled out earlier. Choose it so that it is populated in the box beside Step 1.

**Step 2:** Click Import to import the file you chose in Step 1.

**Step 3:** After a successful import, you will see your spreadsheet data in the grid on the screen at the bottom. The data must be checked for errors before it can be converted into Client IDs. Check for errors by clicking the Check Data button.

Before moving to Step 4, you must clear any errors that appear for each row in the Import Problems column. The red colored text will tell you the particular issue. Once it is fixed, click Check Data again and repeat until all errors (Import Problems column) are clear.

**Step 4:** Step 4 is optional and will delete all data from the grid. If you have a lot of errors, you may just want to delete the data, correct the spreadsheet and start from Step 1. Also, it's possible the clients already exist, so you will just want to delete the data.

**Step 5:** After all errors are clear and the data in the grid is how you would like it to go into the system, click Update Clients. This will create a new Client ID for each row. After this, you can go to Admin Tools --> Client Information if you'd like to view each Client ID that was imported.

## **Admin Tools > Send Invitation**

This is the Send Invitation page where you can choose from a list of Invitees and send the invitation as you see on the screen. All editable fields can be changed and will be reflected in the email sent.

## Fields

**Invitee:** Clients that have never logged in before will show in the Invitee drop down box. When you choose an Invitee, the field data will be changed to be specific to your selection.

**To:** This is the email address where the invitation will be sent. It is populated automatically with the client's primary email address.

**From:** This is the email address where the invitation will be sent from. It is populated

automatically with the logged in client's primary email address.

**CC:** This is not prepopulated. Fill in any email address you'd like to CC.

**BCC:** This is the email address where the invitation will be Bcc'd to. It is populated automatically with the logged in client's primary email address.

**Subject:** This is the subject of the email and may be changed.

**Message:** This is the message of the email and may be changed. Please note it is prepopulated with specific client information using the client in the Invitee dropdown.

## Settings

Please visit the Settings jog dial in the upper right hand corner of your screen.

This section includes:

Download user guides

Contact Us

### OPTIONS

Downloads

Client Information

Devices

Change Password

### Client INFORMATION

For further support please email [intellimessage-support@americanmessaging.net](mailto:intellimessage-support@americanmessaging.net) or contact your Account Manager.