



# NORTEL

## CallPilot™

Release 4.0 - Standard 1.07

### Desktop Messaging User Guide for Lotus Notes



### Internet Clients

#### Page 9 Call the sender of a message

Call the sender of a message is not supported.

Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant Messaging feature, the Contact Sender option must be available.

#### Page 9 Access web-based My CallPilot to view information and change your feature settings

My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

The Internet mail clients supported are:

- Microsoft Outlook 2007
- Microsoft Outlook 2000
- Microsoft Outlook 2002 (XP)
- Microsoft Outlook 2003
- Window Mail (Vista)

Unified Messaging on BCM50 Release 3 supports the following Thin Clients:

- Citrix Metaframe Presentation 4.0 Windows 2003 Server (All editions)
- Citrix Metaframe XP on Windows 2000 Server (All editions) and Windows 2003 Server
- Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server

CallPilot Desktop Messaging does not support Outlook and GroupWise on the same computer.

#### Page 10 What you need

BCM-supported browsers are IE5, IE6, and IE7.

#### Page 13 CallPilot Player

The Call the sender button is not available.

Contact Sender is not supported.

#### Page 38 Addressing messages

The Address Book functionality does not function in the same manner as in GroupWise.

#### Page 56 Linking to My CallPilot

Linking to My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

# Outlook, Lotus Notes, GroupWise

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## Page 10 About this guide

The groupware e-mail clients that are supported are:

- Lotus Notes - 6.0, 6.5, 7.0
- Novell GroupWise - 6.5, 7.0, 7.0.1
- Microsoft Outlook - 2000, 2002 (XP), 2003, 2007

Unified Messaging on BCM50 Release 3 supports the following Thin Clients:

- Citrix Metaframe Presentation 4.0 Windows 2003 Server (All editions)
- Citrix Metaframe XP on Windows 2000 Server (All editions) and Windows 2003 Server
- Citrix Metaframe Presentation Server 3.0 on Windows 2003 Server

## Page 13 (Page 12 Lotus Notes) CallPilot Player

The Call the sender button is not available.

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## Page 13 (Page 12 Lotus Notes) To play a message from your telephone

If your telephone is call forwarded to voicemail, cancel this feature before you access your messages from CallPilot Player.

## Page 18 (Page 15 Lotus Notes) Composing fax and text messages

On the Compose Fax dialog box you can use the Subject field to add additional information to the fax cover page (for example, the name of the recipient) when you send a fax directly to a fax machine. The maximum length you can enter in the Subject field is 80 characters.

## Page 27 Using custom fax Cover Pages

Auto Cover Sheet is not supported.

## Page 34 (Page 28 Lotus Notes) Calling the sender of a message

Calling the sender of a message is not supported.

Contact Sender is not supported. This does not apply to the Instant Messaging feature. To support the Instant Messaging feature, the Contact Sender option must be available.

## Page 35 (Page 29 Lotus Notes) Setting message options

Delivery Receipt is not supported.

NN40090-107 01.01

1-800-4 NORTel

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### **Page 38 E-mail addresses versus Fax/Telephone numbers**

The CallPilot Desktop client always attempts to find a CallPilot e-mail address or address information from Frequent Contacts and other Novell Personal Address books. If the e-mail address field is empty, CallPilot scans the recipient for phone and fax numbers. To send faxes, all other phone number fields must be empty.

### **Page 45 (Page 34 Lotus Notes and Microsoft Outlook) Personal distribution lists**

Distribution Lists (BDL, SDL, PDL) are not supported.

### **Page 55 Changing audio settings**

Admin Restriction of Audio Device is not supported.

### **Page 56 (Page 40 Lotus Notes and Page 39 Microsoft Outlook) Linking to My CallPilot**

My CallPilot is not supported. In its place, access to the web-based Mailbox Manager is supported. The My CallPilot field is replaced with the URL for Mailbox Manager.

### **Page 56 Note:**

CallPilot Player is actually in reference to the Audio Player. Go to **Start>Programs>Nortel>CallPilot>Audio Player**.



# CallPilot Desktop Messaging User Guide for Lotus Notes

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# How to get Help

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This section explains how to get help for Nortel products and services.

## Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

<http://www.nortel.com/support>

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

## Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

<http://www.nortel.com/callus>

## Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

<http://www.nortel.com/erc>

## Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.



CallPilot\* from Nortel is an advanced business communications system that offers exceptional flexibility for managing your messaging needs.

You can work with CallPilot from your telephone or your computer. Desktop Messaging gives you access to your CallPilot mailbox through your Lotus Notes e-mail. Here are some of the many ways you can use CallPilot with your e-mail:

- Listen to voice messages.
- View and print fax messages.
- Record and send voice messages.
- Create and send fax messages.
- Forward and reply to voice and fax messages.
- Call the sender of a message.
- Contact the sender through Instant Messaging.
- Add message options such as urgent and private.
- Add voice, fax, or text file attachments to messages.
- Create CallPilot distribution lists.
- Change your CallPilot password.
- Access web-based My CallPilot to view user information and change your feature settings.

Some features mentioned in this guide may not be available for your CallPilot mailbox. For details, refer to the *Feature availability* topic in the Desktop Messaging online Help, or ask your administrator.

# Getting started

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## About this guide

This user guide is an overview of how to use CallPilot with Lotus Notes e-mail.

The instructions and screen images shown in this guide provide general information for using CallPilot with e-mail. Specific details can vary depending on your computer operating system and the features available for your CallPilot mailbox.

For further assistance in using CallPilot, refer to the Desktop Messaging online Help.

## What you need

Before you start to use CallPilot, your administrator ensures that your e-mail account is correctly configured for CallPilot. Your computer must meet the following configuration requirements:

- CallPilot Player to play and record voice messages
- Nortel Fax Driver to create faxes
- Lotus Notes 6.0 and 6.5 groupware e-mail client
- Windows 2000 Professional or Windows XP
- Monitor with 256-color 800 x 600 capability
- 15 Mbytes of free disk space to install software
- Sound card and speakers for playing voice messages on your computer
- Microphone connected to your computer, or a telephone situated near your computer, for recording voice messages
- LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages
- Internet Explorer 6.0; Netscape 6.2, 7.0, 7.1, 7.2; or Mozilla 1.7.x and Mozilla FireFox 1.0 on RedHat Linux 9 Operating System to access My CallPilot

## Operating in a Citrix Thin Client environment from a Windows Terminal Server

Once the administrator has installed CallPilot Desktop Messaging on the Windows Terminal Server and updated mail databases on the Domino server, Citrix Thin Client users can run the CallPilot-enabled Lotus Notes client.

When a Lotus Notes Client starts for the first time after the server configuration is completed, CallPilot Desktop Messaging detects updated mail database, makes all required modifications in the Lotus Notes client initialization file (NOTES.INI), and prompts the user to finalize the configuration by restarting the Lotus Notes client.

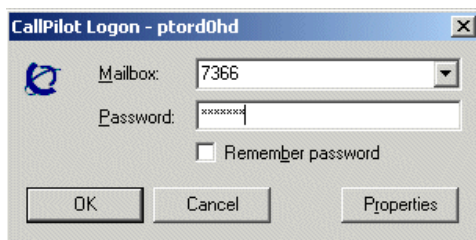
# Logging in

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When you log in to your e-mail, you can log in to CallPilot at the same time.

## To log in from Lotus Notes

- 1 Open any of the CallPilot Desktop Messaging views.  
The **CallPilot Logon** dialog box appears when you open CallPilot Desktop Messaging in Lotus Notes 6.xx or later.
- 2 In **Mailbox**, type or select your mailbox number.
- 3 In **Password**, type your CallPilot password.
- 4 Check **Remember password** if you want CallPilot to log in automatically.
- 5 Click **OK**.



**Note:** Do not leave the **Remember password** box checked on a shared computer.

**Note:** CallPilot Desktop Messaging supports multiple Lotus Notes logins to the same mailbox from more than one computer.

## To log out

When you exit your Lotus Notes e-mail, you automatically log out from CallPilot.

## Remote login

You can log in to your mailbox from any computer with CallPilot installed and configured in the same way as your office computer. For example, you can use a computer set up for guest access, or your home computer with a dial-up connection to the server.

## Multiple Lotus Notes mail database support

CallPilot allows a Lotus Notes user to change mail databases, either at startup or during an active session.

### Startup

If you open a mail database on Lotus Notes client startup that is different from the one used in your previous session, CallPilot Desktop Messaging detects this and synchronizes to the new database automatically.

### Changing your mail database during the active session

You can also change the mail database you are using during the currently active Lotus Notes and CallPilot session (that is, when you are logged on to a Lotus Notes mail database, and are an active CallPilot client).

You change the mail database by either:

- 1 *Accessing the CallPilot Desktop Messaging view in the different Lotus Notes mail database.* CallPilot Desktop Messaging detects this, and warns you that CallPilot is connected to a different mail database. If you choose to connect to the other database, click the **Yes** button in the dialog box; CallPilot synchronizes to the new mail database. If you answer No, no synchronization occurs. To use CallPilot in this case, you must switch back to the mail database with which CallPilot Desktop Messaging is already synchronized.

*OR*

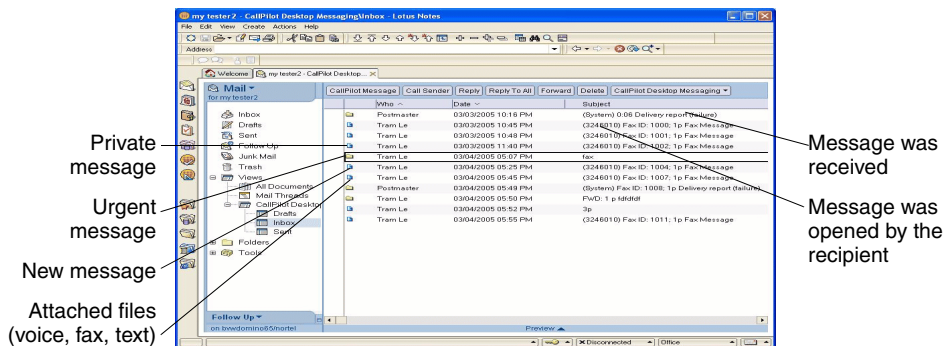
- 2 *Running CallPilot commands (that is, open a message, use menu items, and so on.) in a mail database different from the one with which CallPilot is already synchronized.* CallPilot Desktop Messaging detects this, and warns you that CallPilot must synchronize with the new mail database before implementing the command. When you click **OK**, synchronization occurs; when synchronization is complete, you can run the CallPilot command again.



# Working with your CallPilot messages

When you open your e-mail with CallPilot installed, your CallPilot messages appear in the CallPilot Desktop Messaging view.

## Your CallPilot Inbox



## To check for new messages



The CallPilot message waiting indicator on your screen turns red when you have a new message. To turn the indicator on or off, see *Changing mail delivery settings*, on page 48. New messages appear in red.

## To open a message

To open a CallPilot message, double-click the message line. See *Playing voice messages*, on page 14, and *Viewing fax messages*, on page 15.

## To delete a message



Click a CallPilot message in your Inbox to select it, then click the **Delete** icon on the toolbar. To permanently delete messages, select the **Actions** menu, click **Empty Trash**. In Lotus Notes 6.0 or 6.5, the message is deleted as soon as you click on **Delete**.

*Note: You can delete an open CallPilot message immediately by clicking the Delete icon.*

# Playing voice messages



When you open a voice-only message, the CallPilot Player appears. In mixed voice, fax, or text messages, click the Voice icon to open the CallPilot Player.

## To select your telephone or computer to play voice messages

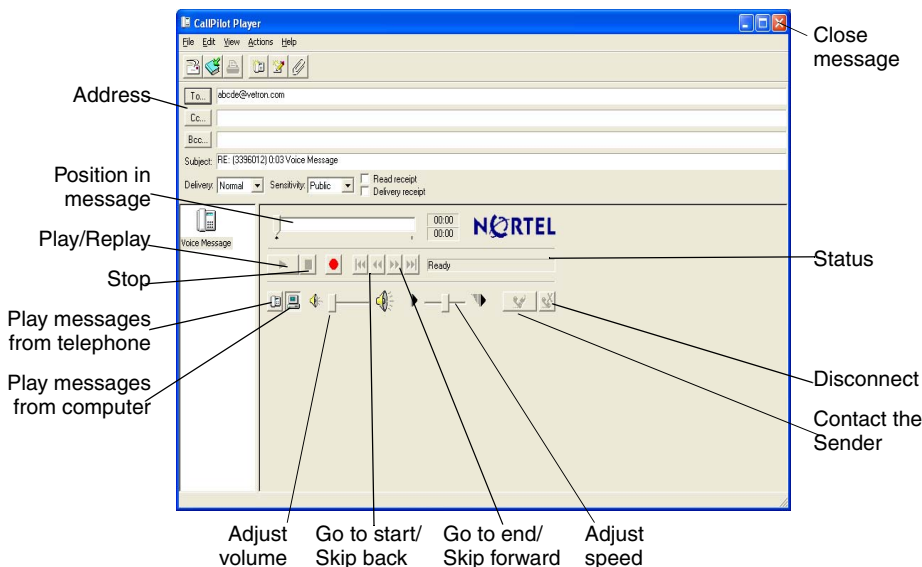
You can choose to play your voice messages from your telephone or your computer. To change from one to the other, or to change the telephone number that CallPilot dials, see *Changing audio settings*, on page 51. You can also click the Telephone or Computer icon on the CallPilot Player to change the setting.

## To play a message from your telephone

- 1 To play a voice message, when your telephone is selected for playback, double-click the message in your CallPilot Inbox, and answer your telephone when the telephone rings.
- 2 Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, and call the sender.
- 3 When you are finished, hang up, and close the message.

## To play a message from your computer

- 1 To play a voice message when your computer is selected for playback, double-click the message in your CallPilot Inbox. The message plays through your computer speakers or your headphones.
- 2 Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, adjust the volume and speed, and call the sender.
- 3 When you have finished, close the message.



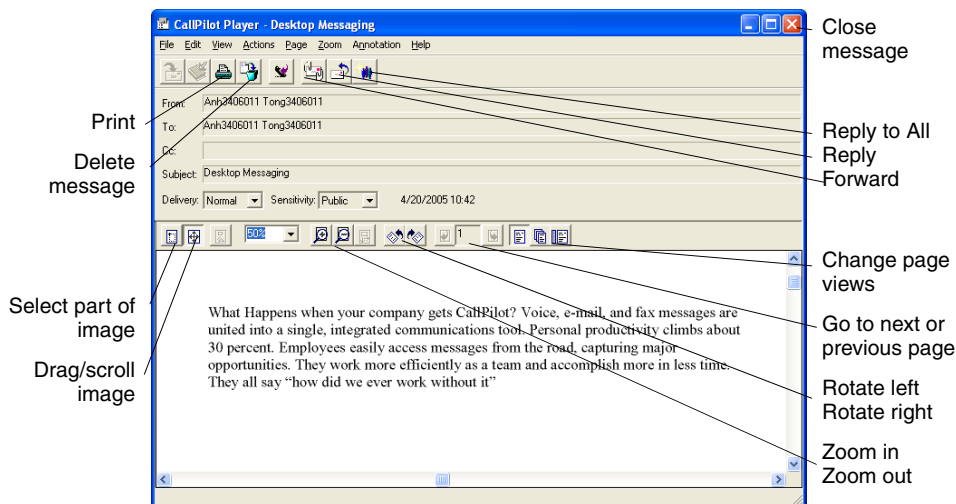
# Viewing fax messages



**Note:** In order to receive faxes, your CallPilot administrator must enable fax capability for your mailbox.

## To view a fax message

- 1 Double-click a fax message in your CallPilot Inbox. When you open a fax-only message, the fax image appears. In mixed voice and fax or text messages, click the Fax icon to view the fax.
- 2 While viewing the fax, you can enlarge or reduce the image, rotate or move it, print it, delete it, save it, forward it, and reply to it.
- 3 When you have finished, close the message.



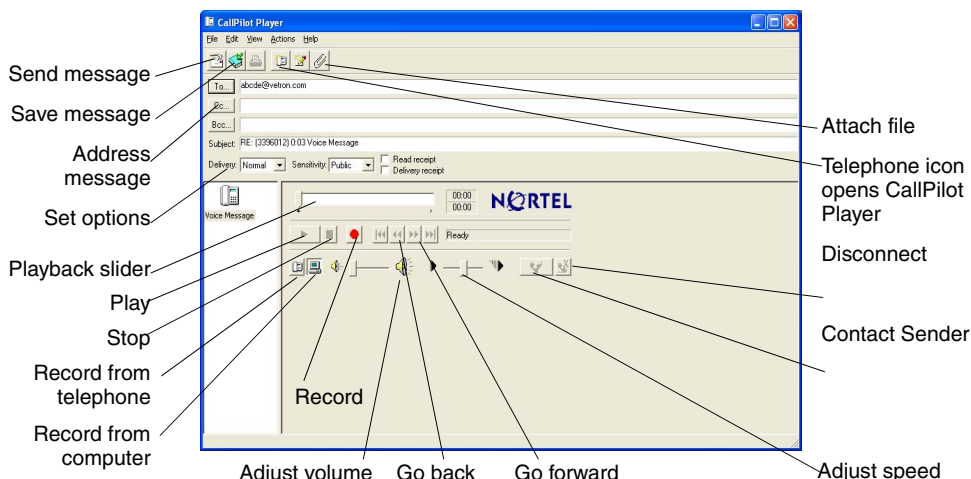
# Composing voice messages

You can record a voice message from the computer or the telephone, then address and send the voice message the same way as an e-mail message.

## To record and send a voice message

- 1 In your CallPilot Inbox, click the **New CallPilot Message** button.
- 2 On the new message form, click the **Telephone** icon in the toolbar to open the CallPilot Player, if the CallPilot Player is not already open.
- 3 On the CallPilot Player, click the red **Record** button to start recording.
- 4
  - If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording, click **Record**, speak again, then click **Stop**.
  - If you are recording from the telephone, answer when the telephone rings. At the tone, record your message. Click **Stop** to end the recording. Click **Play** to review it.
- 5 Click **To...** to address from an Address Book. See *Addressing messages*, on page 39. Or type a formatted address in the **To...** text box.
- 6 Add attachments and options if required. See *Adding attachments to messages*, on page 36, and *Setting message options*, on page 36.
- 7 On the toolbar, click the **Send Message** icon.

**Note:** Insure that rich text format (rtf) format is selected in your e-mail client, if plain text is selected the message delivery may fail.



## To save a newly created voice message as a file

- 1 On a new message form, record a message; on the **File** menu, click **Save as...**
- 2 In the **File** name box, type a name for the file, select a folder in which to keep the file, then click **Save**. Save voice files as .vbk files. Note: CallPilot automatically

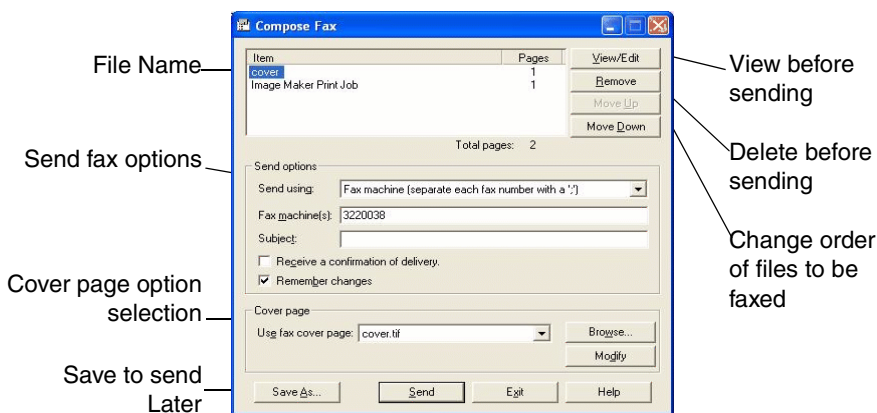
converts .vbk files to .wav files, when sending to non-CallPilot users. See *Changing mail delivery settings*, on page 48.

# Composing fax and text messages

## To create and send a single fax message

To create a fax, your CallPilot mailbox must have fax capability. The CallPilot recipients of your fax must have mailbox capability to receive the fax on their computer. If your recipients access their messages from their telephone, they can view the fax only by printing it. You can also send your fax to a fax machine.

- 1 Open the document that you want to fax. The document must be no greater than 8.5 in. (21.5 cm) in width.
- 2 On the File menu, click **Print**.
- 3 From the list of printers, select **Nortel Fax**, then click **Print** or **OK**.
- 4 The Compose Fax dialog box appears. Before sending the fax, you can add more documents by repeating steps 1 to 3. You can also choose to include a cover page, view the fax, and save the fax as a file for later transmission.
- 5 Select an appropriate **Send using...** option.
  - ▶ To send a simple fax, type the fax machine numbers, or CallPilot mailbox number (append the letter “m” to the CallPilot mailbox number, for example, m7366), in the **Fax machine(s)** text box, type a subject in the **Subject** text box, then click **Send**.
  - ▶ To send your fax as an attachment to a new CallPilot message, select **CallPilot Desktop Messaging for Lotus Notes** under **Send using**, then click **Send**.



A new message form opens with your fax file attached. Address the message from the CallPilot, e-mail, or any Address Book. See *Addressing messages*, on page 39. Or type the formatted address in the **To...** text box

- 6 Add attachments and options if required. See *Adding attachments to messages*, on page 36, and *Setting message options*, on page 36.
- 7 Click the **Send Message** icon.

## To create and send a text message

To create a text message:

- 1 Open a new CallPilot message form.
- 2 Click the **Text** icon in the toolbar.
- 3 Type or past plain text into it, address the message.
- 4 Click the **Send Message** icon.

# Creating and sending fax batch messages

To send customized CallPilot fax messages to multiple recipients, you can use Microsoft Word Mail Merge, and send your print job to the Nortel Fax Batch printer. You must be familiar with Microsoft Word Mail Merge functionality to use this feature. Consult your Microsoft Word documentation. Note that the CallPilot Fax Batch feature is only available to CallPilot Desktop and web users who install the Nortel Fax Batch Print Driver.

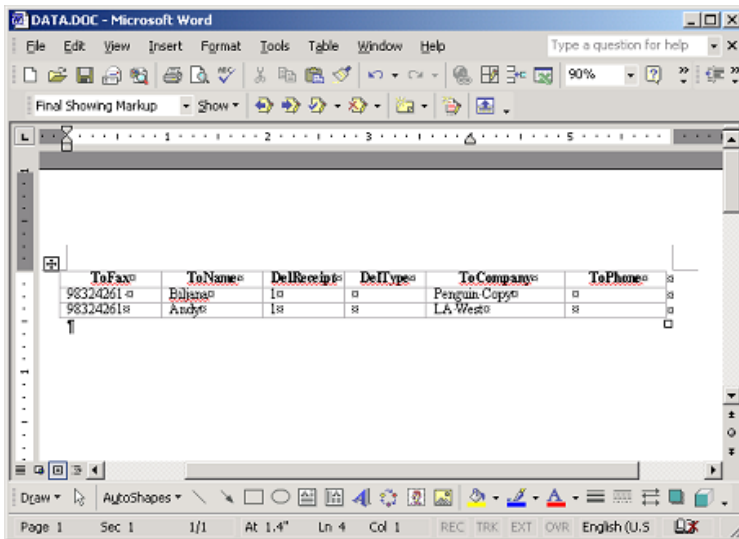
To use Mail Merge with CallPilot, you need your main document (the file you want to send to your recipients) and a data source document, which contains recipient information such as names and fax numbers.

Your CallPilot Desktop Messaging installation includes a sample Microsoft Word data source document named Data.doc and a sample Microsoft Word main document named Sample.doc.

## Accessing and modifying the example Data source document

The Data.doc file consists of a Microsoft Word table, organized in columns, with one row for each recipient. The following column headers exist in the sample: ToFax, ToName, DelReceipt, DelType, ToCompany, and ToPhone. These column headers can be modified and deleted, and new columns can be added. The column header names serve as tags, which can be inserted into the main document, to customize the fax for each recipient, or to direct CallPilot how to handle the fax.

- 1 Go to \Program Files\Nortel\CallPilot\nda directory, and open the Data.doc file.



- 2 Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.



- 3 Add the required data under each column header. The data source can be created by any means available to populate a Microsoft Word table, including importing information from existing files.

If you edit the recipient list using the Mail Merge utility (that is, click on Edit in the Data source section of the Microsoft Mail Merge Helper), the Data Form window opens and lists all the entries from the data source table. You can add, delete, modify, and search for records in this window. Any column headers that you added or modified in the data source file will automatically appear in this window. Note that the **ToFax** text box is the only mandatory text box for CallPilot.

The following parameters and characters are supported in the **ToFax** text box:

- Maximum supported length for the fax phone number is 120 characters.
- Numbers 0 through 9 are supported.
- Uppercase and lowercase P and the comma is used when a pause is necessary.
- The Pound sign (#) is used by some fax servers, and is supported.
- Common phone number symbols, such as left and right parentheses and the dash, are supported.
- Spaces are supported.
- When placed before a CallPilot mailbox number, to designate the mailbox address, the M is not case-sensitive,

The other text boxes are optional, and are used to customize, or to direct CallPilot how to handle, the fax. Three specific CallPilot text boxes and their parameters are:

- **ToName:** This is the fax recipient's name, and can be up to 256 characters in length.
- **DelReceipt:** You can use this tag to receive a Delivery Receipt in the form of a CallPilot message in your CallPilot mailbox, when the fax is delivered to the recipient. If the DelReceipt text box is set to 1, then a delivery receipt is generated. If DelReceipt is set to 0, a delivery receipt is not generated for that recipient. If the DelReceipt text box is empty, or the field is not in Data.doc, then no delivery receipt is generated.
- **DelType:** This text box is used to set a delivery priority for each recipient. If the DelType text box is set to 0 or is left empty (or if DelType Text Box is not present in your Data.doc), the message is tagged for Normal delivery. If DelType is set to 1, then the message is tagged for Economy delivery. If DelType is set to 2, then the message is tagged for Urgent delivery. Messages sent to non-CallPilot recipients with the Delivery Type set to Economy is delivered on a schedule defined by the CallPilot server for Economy delivery. Note that messages sent to CallPilot mailboxes are not affected by the Economy designation, and is sent as Normal messages. Transmission of messages tagged as Normal or Urgent begin immediately. The Urgent icon is displayed from My CallPilot or a Desktop Messaging client and a voice prompt identifies the message as Urgent from the

CallPilot telephone interface. Messages sent Urgent are treated as Normal when they are sent to non-CallPilot addresses.

- 4 Once the table is updated, save all changes. You normally supply a unique name for your data file here; however, for the remainder of these procedures, the name Data.doc is used.
- 5 Close the document. The Data.doc file can now be used as a data source by Microsoft Mail Merge.

## Accessing and modifying the example Main document

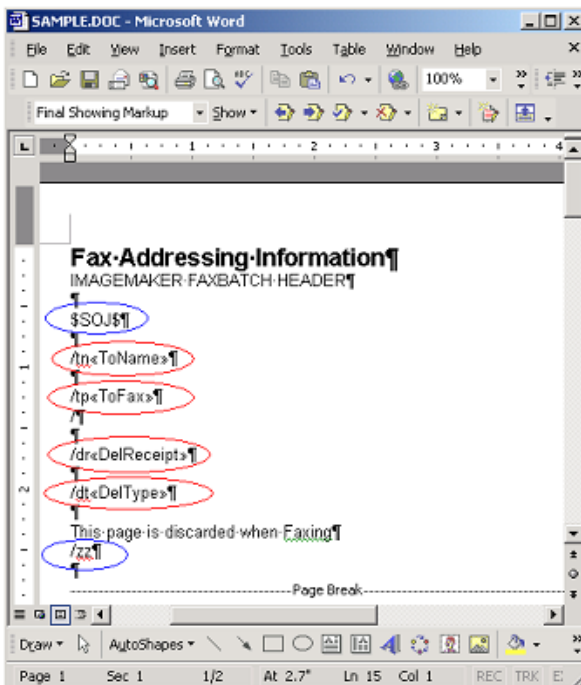
The Sample.doc file is an example of a Microsoft Word main document.

- 1 From the \Program Files\Nortel\CallPilot\nda directory, open Sample.doc in Microsoft Word.

This document contains tagged fields corresponding to those in the example Data.doc file. You can use this as a template for your own fax, or for practice purposes. If you modify the column header names in Data.doc, you must modify them in your main document as well.

### First page

The first page of the main document is a special page and does not become part of the final fax. Sample.doc is installed with the first page set up correctly.



The purpose of this page is to provide a location to map information in the data source to each customized fax document. To signal CallPilot that this is a Fax Batch file, and to prevent this page from becoming part of the fax, two special control codes **must** be present on the first page:

- \$SOJ\$ Start of Job, signals the fax driver to start processing, and can be placed anywhere on the first page.
- /zz Start this page, prevents the first page from becoming part of the fax message, and can be placed anywhere on the first page.

The CallPilot Desktop software retrieves the Fax Number from the first page of the document. Additionally, CallPilot Desktop software retrieves the Recipient Name, the Delivery Receipt, and the Delivery Type, if they exist on the first page.

- /tp Fax Number, is used to address the message. **This text box is required.**
- /dr Delivery Receipt, is turned on or off for each recipient. **This text box is optional.**
- /tn Name of Recipient, is used to identify the record in the Nortel Fax Batch Status dialog if the fax number is either missing or invalid. **This text box is optional.**
- /dt Delivery Type, is used to mark messages for Normal, Economy or Urgent delivery. **This text box is optional.**

To complete the page, the Fax Number column header (that is, <<ToFax>>) must be inserted after the /tp control using the Mail Merge insert function. Also, the Delivery Receipt column header (that is, <<DelReceipt>>) can be inserted after the /dr control, the Name of Recipient text box (that is, <<ToName>>) can be inserted after the /tn control, and the Delivery Type text box (that is, <<DelType>>) can be inserted after the /dt control.

**Note: all Fax Batch controls are case sensitive.**

As an advanced fax addressing feature, users can also modify all data in a single column, without actually modifying the data source file. For example, if an existing data source table contains fax numbers for a large number of recipients, but the external access number 9 is missing, this number can be added to all fax numbers by modifying the control on the first page of the document as follows:

/tp9<<ToFax>>

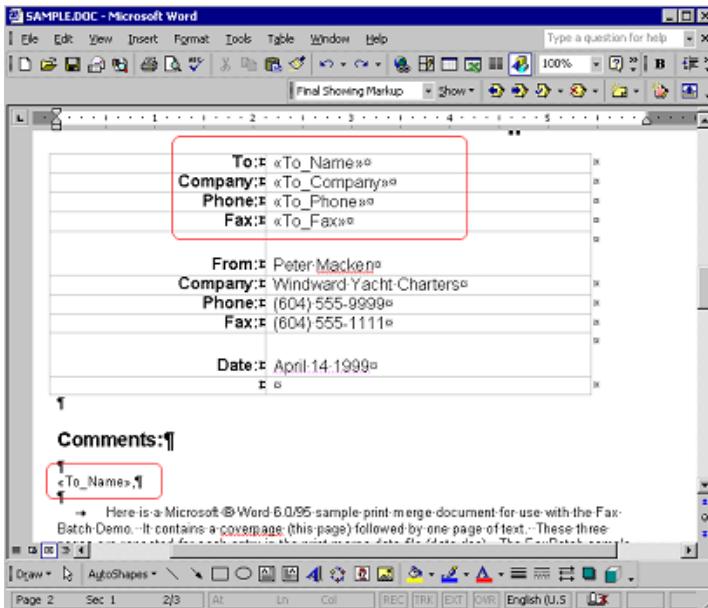
In this example, a 9 is added to the beginning of each phone number during fax batch processing. The data source remains unchanged, and can be used from a different location that does not require a 9 for external access.

## Second page

Once the data source document and the first page of the main document are created, you can begin to customize your fax.

**Note:** The page must be equal to, or less than 8.5 inches in width.

You can use all of the data source column header tags to customize the document. The following is an example using the Sample.doc file:



In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the Microsoft Word Mail Merge utility Insert function. After the main document is customized, the document is ready to be merged with the information in the Data.doc file. Consult your Microsoft Word Mail Merge help for more details on inserting data source text boxes into the document.

## Merging data from the Data Source into the Main Document

When you are ready to merge data from the data source file into your main document:

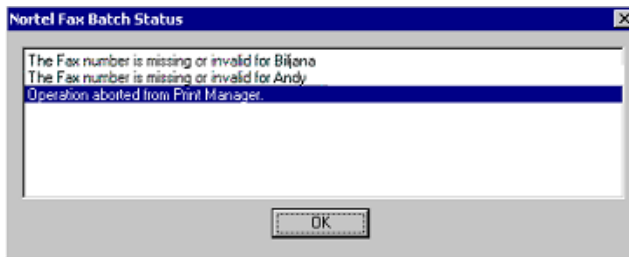
- 1 Start Mail Merge from the Microsoft Word Tools menu. Depending on which version of Microsoft Word you are using, Mail Merge is found under different menu headings.
  - a. In the Office XP version, select **Tools> Letters and Mailings> Mail Merge Wizard**.
  - b. In Office 2000 select **Tools> Mail Merge**.
- 2 Verify that Sample.doc is currently selected as the main document, and that Data.doc is currently selected as the data source.

- 3 Select **Merge to Printer**, and then select the Nortel Fax Batch driver from the **Print** dialog box that appears.  
*Note: Ensure that Microsoft Word is not set up to print pages in reverse order.*
- 4 Click **OK** in the **Print** dialog box to initiate the batch fax process.

When the document is merged, data values from the data source file are merged into the main document at the appropriate tag positions and a separate fax TIF file for each recipient is created. CallPilot Desktop software addresses and transfers the fax files to the server. The CallPilot server is responsible for sending the fax to the recipients.

Once the process starts, the **Print Status** dialog box appears. The page number increases incrementally as each page is converted to a TIF file. Since the first page is skipped, this page is not included in the count. For example, if a three-page fax is sent to ten recipients, the dialog box displays "Printing page 1," "Printing page 2," and so on up to "Printing page 20." Only 20 pages are printed, because the first page of each document is skipped.

Problems that occur while creating the fax images, or with the fax addresses, are displayed in a separate Nortel Fax Batch Status dialog box, such as:



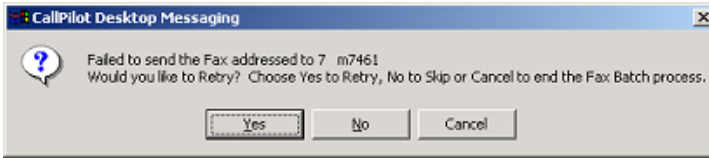
Problems, such as a missing fax address or an unsupported fax address format, are checked. However, problems such as a wrong fax number are not identified, provided the number is in a valid format. A wrong fax number, however, results in the sending of a non-Delivery receipt to the user's CallPilot mailbox by the CallPilot server.

When you click the **OK** button, the batch process ends and no faxes are sent. You must fix the fax addresses, and resubmit the job.

If all faxes and addresses are created properly, a dialog box appears while the faxes are being addressed and transferred to the CallPilot Server. The Nortel Fax Batch Status dialog box indicates the status of the batch job. If you press **Cancel** in this dialog box before the job is completed, another dialog box appears asking you to confirm the cancellation. If you select **Yes**, all temporary files are deleted and the process ends. However, all faxes that are transferred already to the CallPilot server are sent.

If a problem occurs while transferring the fax, a dialog box similar to the following

appears:



If you select Yes, an attempt is made to resend the fax to the server. If you select No, the current fax is skipped, and processing begins on the next fax in the list. The skipped fax is not sent. If you select Cancel, another dialog box appears, asking you to confirm the cancellation. If you choose Yes, all temporary files are deleted, and the process ends. Any faxes that have already been transferred to the CallPilot server is sent. If you choose No, the failure dialog box shown above are displayed again, allowing you to make a different choice.

After all the faxes are transferred successfully to the server, a dialog box confirms this.

# Using custom fax Cover Pages

CallPilot users can choose to include a cover page with their faxes. The server administrator typically designs and manages these cover pages. The user simply chooses the desired style of cover page (if more than one is available).

Cover pages created with these tools include the following information:

<b>From Information:</b>	Title	Name	Department	Company
	Phone number		Fax number	
<b>To Information:</b>	Title	Name	Department	Company
	Phone number		Fax number	

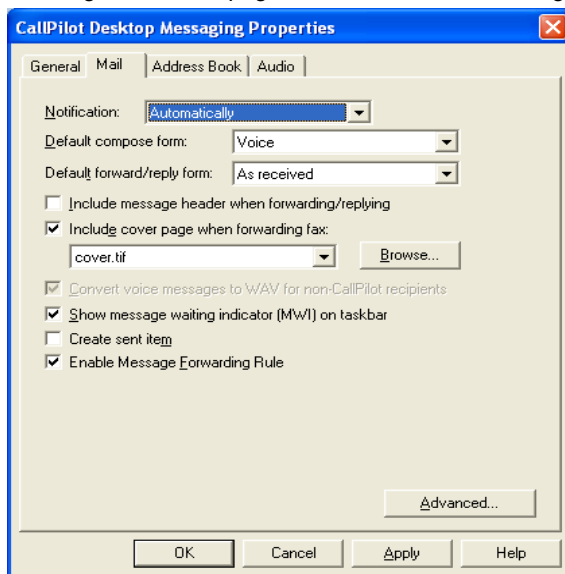
Number of Pages

Sent Date & Time

A Cover Sheet Memo section

## CallPilot Configuration

The CallPilot Desktop Messaging Configuration page includes an option labeled "Include cover page when forwarding fax message". The default value for this is unchecked, meaning that a cover page is not added to the message

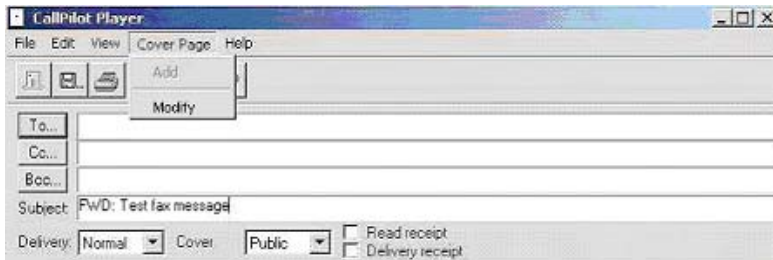


If you select this option, you can then choose and set a default cover page from a list of available cover pages. Use the **Browse...** button to choose the location where the cover pages are stored. The default location is:

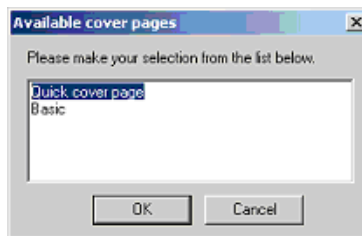
\\Program Files\\Nortel\\ CallPilot\\cvrpages.

## CallPilot Desktop Messaging Custom form

The Custom Fax Forward form of CallPilot Desktop Messaging contains a menu item named **Cover page**, which contains two submenus items: **Add** and **Modify**.



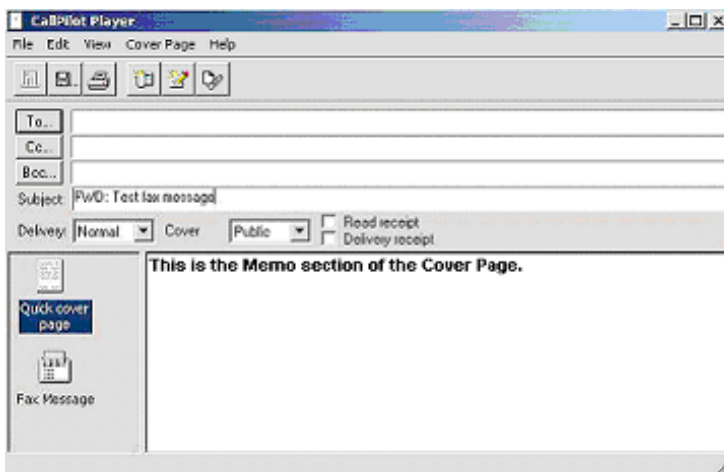
The **Add** menu displays a list of existing cover pages available to use. Select one of these, and click **OK**.



The **Modify** menu displays the current cover page content and allows you modify it. From the "Modify" window, you can also preview the current cover page.

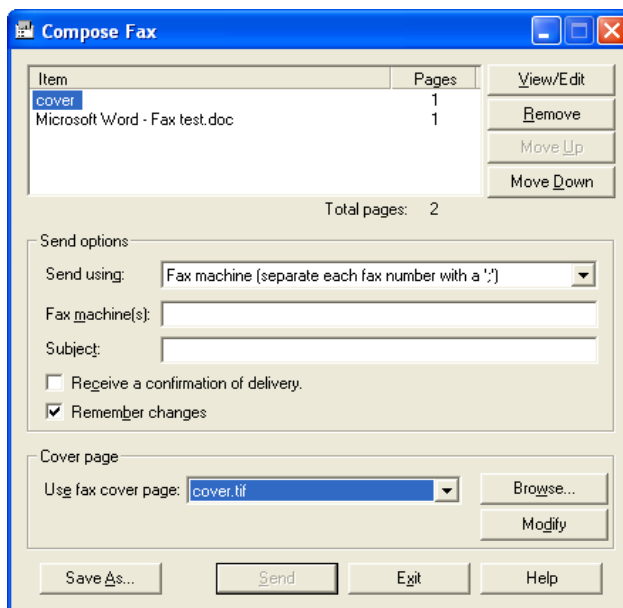
If you enable the **Include cover page...** option, CallPilot Desktop Messaging adds the selected cover page to the Fax Forward form. The cover page appears as the first attachment on the list of attachments (left pane). The Attachment view (right pane) contains only the Cover Sheet Memo section of the cover page. You can include any additional required information here.





## Nortel Fax Printer Driver form

You can use the Nortel Fax Printer form to send a fax message, using either a CallPilot Desktop Messaging client (such as Lotus Notes) or the QuickFax feature. QuickFax allows you to send a fax directly from the **Print** dialog box. If you choose to send your fax using a CallPilot Desktop Messaging client, the cover page is available from the CallPilot Custom form.



If you choose to send your fax to a specific destination (for example, a fax machine), the Cover page text box becomes active. This allows you to browse for a cover page, through the use of the **Browse** button, or you can choose to select one from the drop-down list. You can then modify the cover page contents. The modification of the cover page provides functionality similar to the Custom form. (Refer to Modify and Preview cover page for details.) You can also choose not to include a cover page by selecting the **No cover page** option from the **Use fax cover page** drop-down list. Note that you can also include a subject line here. The Subject text box information is displayed only in the e-mail portion of the fax; the subject line is not displayed on a hard copy of the fax.

### Modify and Preview cover page

You can preview the current cover page and modify its contents from both the CallPilot Custom form and the Nortel Fax Printer driver application.

**Modify Cover Page**

To  
Title: Mr Name: Jones  
Company: Company Name Department: 445588  
Fax: Phone: 9558889421

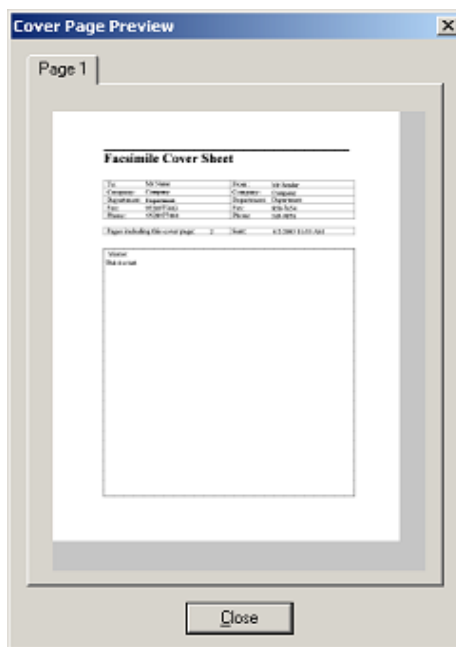
From  
Title: Mr Name: Name  
Company: Company Name Department: Z345  
Fax: 505555555 Phone: 505555556

Pages: 2 (including cover) Sent: 5/19/2005 9:19 AM

Memo  
This is the Memo section of the cover page.

Preview OK Cancel Help

Click **Preview** to view the current state of the cover page.



The first time you access this page, CallPilot Desktop Messaging attempts to fill in the From section using information from the registry. Desktop Messaging remembers the data that you entered into this section, and automatically completes those text boxes the next time you use this page. Although the From information is automatically populated from the registry, you can still change it.

In the To section, one text box is always read-only, the Fax text box. CallPilot populates the Fax text box, using address information from the Custom or Fax Driver forms. The Name text box is read-only if the cover page is filled using the Custom form. In this case, CallPilot automatically fills the Name text box using the recipient's name. If you use the Fax Printer driver, this text box is left empty, and you can complete it.

If a cover page is used from the Fax Printer driver, CallPilot Desktop Messaging computes the number of pages, and enters this information in the Pages text box. When you use the Custom form, the Pages text box is left empty. You can modify this text box in either case.

The Sent text box uses the current time and date by default. This text box is also editable. The Memo section is synchronized with the Memo section of the Custom form.

**Note:** The maximum length of all cover page text boxes, except the Memo text box, is 30 characters. The maximum length of the Memo text box is 2500 characters.

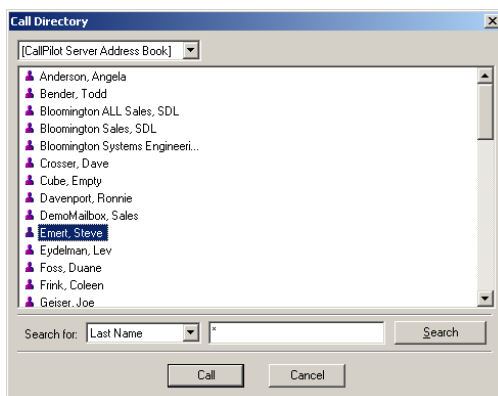
# Initiating a call using Call Directory

The Call Directory feature allows you to call any person listed in the Lotus Notes Public or Personal Address Books, CallPilot Personal Address Book, the CallPilot Address Book on the Lotus Notes Domino server, or the CallPilot Dynamic Address Book on the CallPilot server.

The Call directory feature is available through a number of avenues:

## When any CallPilot view is active

Access this feature from the **Actions-> CallPilot Desktop Messaging-> Call Directory** menu item when any CallPilot view is active. When the Call Directory menu item is selected, the **Call Directory** dialog box is presented. You can select any available Address Book, select the person, and then initiate the call by pressing the Call button.



Depending on the selected Address Book, CallPilot attempts to retrieve telephone numbers from different phone fields.

- If the person is selected from CallPilot Personal Address Book, CallPilot Address Book on the Lotus Notes Domino server, or CallPilot Dynamic Address Book on the CallPilot server, telephone numbers retrieved from the CallPilot - Office Phone field.
- If the person is selected from Lotus Notes Public Address Book, telephone numbers are retrieved from the Work - Office Phone and Cell Phone fields, and the Home - Home Phone field.
- If the person is selected from Lotus Notes Personal Address Book, telephone numbers are retrieved from the Business - Office Phone and Cell Phone fields, and the Personal - Home Phone field.

## When the CallPilot Personal Address Book is open

The Call directory feature is also available through the **Actions-> Call** menu item when the CallPilot Personal Address Book is opened or the Call button is pressed. CallPilot attempts to retrieve telephone numbers from the CallPilot - Office Phone field.

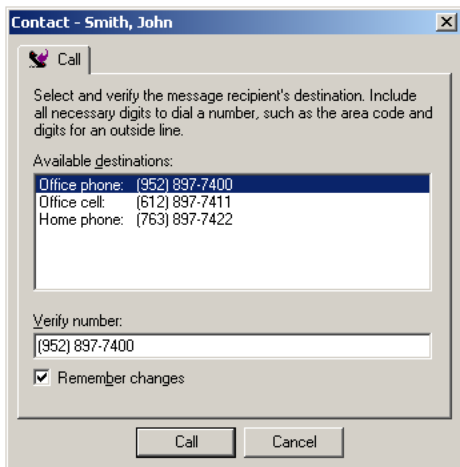
## When the Lotus Notes Public or Personal Address Books are open

The Call directory feature can also be made available when the Lotus Notes Public or Personal Address Books are opened. This requires the administrator to make certain changes on the Domino server.

- To call a person from the Lotus Notes Public Address Book, you select a person, then select the **Call** menu item in the Actions menu, or click the **Call** button on the **Address Book** toolbar. CallPilot attempts to retrieve telephone numbers from the Work - Office Phone and Cell Phone fields, and the Home - Home Phone field.
- To call a person listed in the Lotus Notes Personal Address Book, you select a person, then select the Call menu item in the Actions menu, or press the Call button on the Address Book toolbar. CallPilot attempts to retrieve telephone numbers from the Business - Office Phone and Cell Phone fields, and the Personal - Home Phone and Cell Phone fields.

## Contact Verification

Once CallPilot has extracted all valid telephone numbers, you are prompted to select and validate the telephone number before a person is called. Any changes made to the number are cached in the registry, if Remember changes is selected.



If CallPilot cannot find any valid telephone numbers, then depending on the client, only the person's e-mail address is listed. Since the e-mail address or name cannot be dialed, you must manually enter the person's complete telephone number. The number is cached in the registry, if Remember changes is selected.

# Contacting the sender of a message


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You can respond to a CallPilot or a Lotus Notes e-mail message with a telephone call instead of a recorded message.

- 1 Select a message in your CallPilot or Lotus Notes Inbox.

IF	THEN
a Lotus Notes e-mail message is selected in the Lotus Notes Inbox	<b>Go to Actions &gt; CallPilot Desktop Messaging &gt; Contact Sender</b>  <b>Note:</b> To make this (optional) feature available, the Domino server administrator must make changes to the corporate mail templates. The CallPilot installation includes a modified version of the mail template with the necessary design changes. Use the modified template to replace the design of your mail templates, if they are <i>not</i> customized. If your mail templates are customized, copy the Contact Sender action from the CallPilot mail database template to your customized template on the Domino server.
a CallPilot message is selected in the <b>CallPilot Inbox</b>	<b>Go to Actions &gt; CallPilot Desktop Messaging &gt; Contact Sender</b> or click “Contact Sender” toolbar button
a CallPilot message is opened in the <b>CallPilot Inbox</b>	<b>Go to Actions &gt; Contact Sender</b> or click “Contact Sender” toolbar button

- 
- 2 If the person is selected from CallPilot Personal Address Book, CallPilot Address Book on the Lotus Notes Domino server, or CallPilot Dynamic Address Book on the CallPilot server, the telephone number is retrieved from the CallPilot - Office Phone field.
    - If the person is selected from Lotus Notes Public Address Book, telephone numbers is retrieved from the Work - Office Phone and Cell Phone fields, and the Home - Home Phone field.

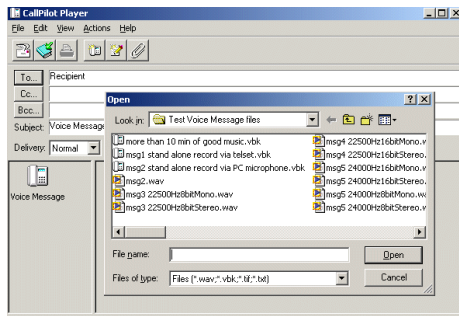
- If the person is selected from Lotus Notes Personal Address Book, telephone numbers is retrieved from the Business - Office Phone and Cell Phone fields, and the Personal - Home Phone field.
- 3 The e-mail sender's Address Book entry can contain multiple numbers. Therefore all telephone numbers that can be found for the sender in the Office, Home or Mobile fields are presented to you in the **Contact** dialog box. Choose the appropriate number, and press the Call button. The CallPilot Desktop client remembers any changes you make if you select the Remember Changes checkbox.
- 4 Answer the telephone when the telephone rings. CallPilot immediately calls the sender of the message.
- 5 When you finish the call, hang up the telephone, or click Disconnect .

# Adding attachments to messages

Before sending a message, you can attach one or more voice, fax, or text files to it. Voice files can be .vbk or .wav format for CallPilot recipients; CallPilot can automatically convert .vbk files to .wav files when sending to non-CallPilot users. See *Changing mail delivery settings*, on page 48. Fax files must be .tif format. Text files must be .txt format.

## To attach a file to a message

- 1 On a new message form, click the **Attach File** icon.
- 2 In the **Open** box, select or type the name of the files that you want to attach.
- 3 Click **Open** to attach the files and return to the new CallPilot message.



## Setting message options

Before sending a message, you can set options for handling and delivery.

### To set message options

- 1 On a new message form, select **Delivery**, **Sensitivity**, and **Receipt** options, as required.

Delivery:  Sensitivity:  ☒ Read receipt ☒ Delivery receipt

- ▶ For Delivery, select **Urgent**, or leave the setting as **Normal**.
- ▶ For Sensitivity, select **Private**, or leave the setting as **Public**.

When you send a message marked Private, recipients can forward the message to someone else, if they are not CallPilot users. Also, recipients in non-CallPilot systems are not informed of Private settings. In your message, tell the recipient that the message is Private.

- ▶ For Receipt acknowledgment, check **Read receipt** to request acknowledgment that your recipient opened the message. Check **Delivery receipt** to request acknowledgment that recipients received the message.
- 2 Continue to compose, address, and send the message as usual.



# Forwarding and replying to messages

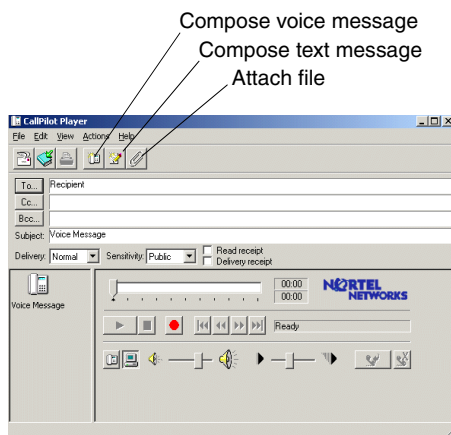
You can forward a message and append an introduction to it. You can also compose a reply to the sender of a message, or to the sender and all recipients of a message.

## To forward or reply to a message

- 1 In an open message, click **Forward**, **Reply**, or **Reply to All**.



- 2 On the new message form, compose a voice, fax, or text message.
- 3 Address forwarded messages the same way as a new message. Replies are addressed automatically.
- 4 Add attachments, set options, and change the subject line if required.
- 5 Click the **Send Message** icon.



*Note: Your administrator can block messages forwarded to external e-mail addresses.*

## Message Forwarding Rule

The Message Forwarding Rule can be configured by the system administrator or by the My CallPilot user. The Message Forwarding Rule feature enables you to automatically forward some or all of your CallPilot messages to an address configured by the system administrator. The user must enable the Message Forwarding Rule. If a message cannot be delivered the Message Forwarding Rule is disabled. Once the user receives notice of the undeliverable message, the Message Forwarding Rule, must again be enabled.

Messages forwarded from the CallPilot server are delivered to the e-mail account configured in the Message Forwarding Rule. You can treat these messages as any other e-mail. Messages can be forwarded, printed, saved, archived, and deleted, can have rules applied to them, and so on.

Lotus Notes users receive the forwarded messages in their Notes Inbox. The messages appear as Lotus Notes e-mail, and honor all rules that apply to Lotus Notes e-mail messages.

For users of Lotus iNotes, forwarded CallPilot messages appear as Lotus Notes e-mail messages. The messages honor all rules that apply to iNotes e-mail messages. The messages are displayed with Lotus iNotes e-mail icons and the standard iNotes e-mail

form are used to display the message.

Note, however, that there are a few limitations when using the Reply/Reply All functionality. You cannot reply to messages from a sender whose address/CLID is not included in the message, because the address is unknown. Also, because the CallPilot server can accept only plain text messages and attachments of type VBK or TIF-F, you must ensure all outgoing messages addressed to a CallPilot address are composed using these types. If a message is sent to a CallPilot address with a different attachment type, or in a format other than plain text (for example RTF), you receive an NDN. Note also that voice messages sent in VBK format play only if CallPilot player is installed on the system. Voice messages sent in WAV format require a WAV player capable of playing standard WAV-PCM. Most standard WAV players support this format.

**Note:** In order to enable or disable Message Forwarding Rule from the desktop client interface you use your account information in the Address Book advanced section and not an anonymous log on.

**Note:** If the Exchange 6.5 server is used for outgoing SMTP messages, messages are not marked as Read when they are opened by the recipient because the Read Receipt does not get sent back to CallPilot. You should either use **Forwarded by this Service** option or turn off **Mark original message as Read** option when configuring Message Forwarding Rules.

# Addressing messages

CallPilot users can access a variety of Address Books to address messages. These include the CallPilot or Lotus Notes Public Address Book (located on your CallPilot or Lotus Notes server respectively) or your Personal (local) Address Book. An address can be either internal or external to your organization.

If you are a Lotus Notes user on a Terminal server, you cannot download CallPilot message addresses into your Personal Address Book. The Address Book is not available to Terminal server users when addressing CallPilot messages.

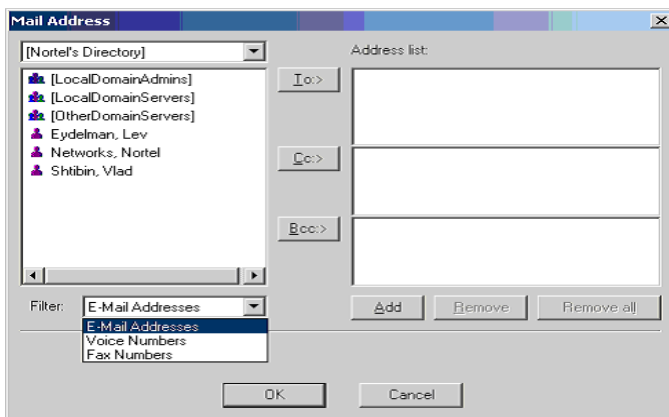
## To address a message using a Lotus Notes Address Book

A Lotus Notes Public Address Book contains number information fields named Office phone and FAX phone, CallPilot users can directly access these numbers. (Note that in a Lotus Notes Personal Address Book, these fields are called Office phone and Office fax respectively.)

To address your message:

- 1 In a new CallPilot message, click **To...**
- 2 In the Address Book field, select the Address Book that you want to use. If the Lotus Notes Public Address Book is selected, an additional Filter drop-down list box is displayed. Using this control, you can specify what type of address to use.
  - ▶ If **E-Mail Addresses** is selected, the address list display all names.
  - ▶ If **FAX Numbers** is selected, the address list displays names that have FAX phone information.
  - ▶ If **VOICE Numbers** is selected, the address list displays names that have Office phone information.

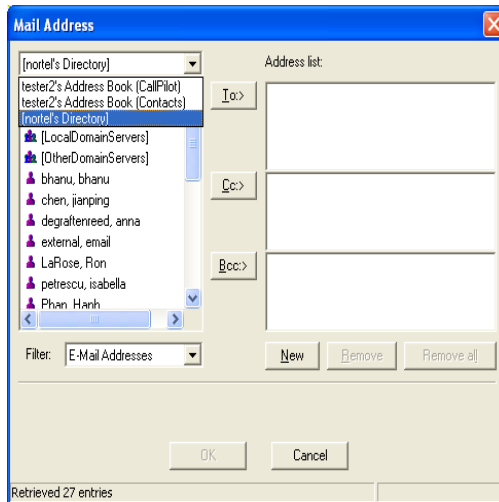
**Note:** You can address the same message to different types of recipients.



- 3 Select the recipients from the list of names. Group names are in square brackets. You can select more than one address at a time. If you address a message using

Voice or Fax numbers, you are prompted to choose and verify the final destination.

- 4 Click **To ->**, **Cc ->**, or **Bcc ->**, as required.
- 5 Click **OK** to return to the new CallPilot message.



## To address a message using a CallPilot Address Book

The CallPilot Address Book on the server is maintained by your organization, and contains the addresses of the CallPilot users and distribution lists that you are allowed to use. You cannot edit this list.

Lotus Notes Desktop clients access the CallPilot Address Book through a dynamic lookup utility. This feature allows you to access the CallPilot Address Book, without requiring you to maintain CallPilot address information in your Lotus Notes Personal Address Book. However, you can download CallPilot address information to your Personal Address Book if you want to address messages in offline mode. Such addresses cannot be validated in the offline mode.

To address your message:

- 1 Log on to a CallPilot server, if you have not already done so.
- 2 Select the CallPilot Server Address Book from the list of available Address Books. When the CallPilot Address Book is selected, additional controls are made available to dynamically search for CallPilot addresses on the CallPilot server in a number of ways. For example:
  - a. Select the search type **Last Name** in the **Search For** combo box.
  - b. Enter a set of letters into the text box.

- c. Click on **Search**. All records with the last name matching the letters are returned and displayed in the address list.

**Note:** You can continue to change search types and modify letters until you find the desired name. If you enter a name that is not downloaded, a dialog box displaying the number of addresses to download can appear while the search proceeds.

- 3 Select the recipients from the list of names. You can select more than one address at a time.
- 4 Click **To ->**, **Cc ->**, or **Bcc ->**, as required.
- 5 Click **OK** to return to the new CallPilot message.

## To address a message manually

You can type an address directly into the **To** text box of a new message without opening the Mail Address dialog box. Type the address with no spaces, and enclose the address in double quotes. The name is resolved against all available Address Books and address types. If more than one address is found, you are presented with a CallPilot Recipient dialog box showing all the matching addresses. Choose which address to use for the message. You can modify telephone or fax numbers here, but not CallPilot or e-mail addresses.

## To download CallPilot addresses to your Personal Address Book

You have the option of downloading the names and addresses of CallPilot users to your Personal Address Book. This is useful if you are working in offline mode. In the online mode, Lotus Notes Desktop Clients can query and retrieve addresses from the CallPilot server Address Book at any time. See *Changing your Address Book settings*, on page 50.

## Restrictions

When you submit a message to the CallPilot server for delivery to a telephone or fax number, the CallPilot server reviews the Restriction Permission Lists (RPL) to validate that the sender has the necessary permissions. The same rules that determine if a number can be dialed from your telephone are applied to the destination number of the outgoing voice or fax message.

If you lack the necessary permissions (for example, cannot utilize voice channels, cannot place long distance calls), a Non-Delivery Notification (NDN) is generated. An NDN also is generated for the recipient, if the destination number is deemed invalid.

# CallPilot distribution lists

---

You can create a Personal Distribution List (PDL) over the phone or in My CallPilot. Using the Lotus Notes client, you can also create a Group in the local or public Lotus Notes Address Books. However, Lotus Notes Address Books are not accessible from the telephone or from My CallPilot.

## To use existing CallPilot personal distribution lists

You can address messages using CallPilot personal distribution lists that you create in My CallPilot or on your telephone. In Lotus Notes, select these lists from the CallPilot Address Book.

## To create a CallPilot group

You can create a Personal Distribution List (PDL) for a group of recipients to whom you frequently send messages. When you create a list, the PDL appears in your Personal Address Book in Groups (CallPilot).

You create a CallPilot group in the same way that you create an e-mail group. The CallPilot group can contain CallPilot and e-mail addresses.

- 1 In your Lotus Notes Inbox, click the **Address Book** icon.
- 2 Select **Groups (CallPilot)**, then click the **Add Group** button.
- 3 Enter a **Group Name** and **Description**, then click the arrow beside **Members**.
- 4 In your Personal Address Book, place a check mark beside each name that you want to add to the group. Click **OK** to exit the list.
- 5 Click the **Save** button.
- 6 Click the **Close** button.

You can edit or delete the list in Groups (CallPilot).

# Instant Messaging

The Instant Messaging feature allows you to start an Instant Messaging (IM) session through Microsoft Windows/MSN Messenger/Nortel Multimedia PC Client (MCS 5100) from a CallPilot or e-mail message.

You can initiate an Instant Messaging connection with other users, provided both parties have a valid account on MCS 5100 (Nortel Multimedia PC Client) or with one of the following services available in Windows/MSN Messenger:

- NET Passport Service (Windows/MSN Messenger)
- SIP Communication Service (Windows Messenger only)
- Exchange Instant Messaging Service (Windows Messenger only)

There are no special requirements to configure these services. You must configure these accounts according to Windows/MSN Messenger requirements. For the SIP Communication Service on MCS 5100 configuration, you must have a configured and fully-operational Nortel Multimedia PC Client to use its Instant Messaging functionality.

## To activate Instant Messaging functionality in CallPilot Desktop Messaging

To activate Instant Messaging in CallPilot Desktop Messaging, you must select the applications to be used. Use the **General** tab of the **CallPilot Desktop Messaging Properties** dialog box for this.

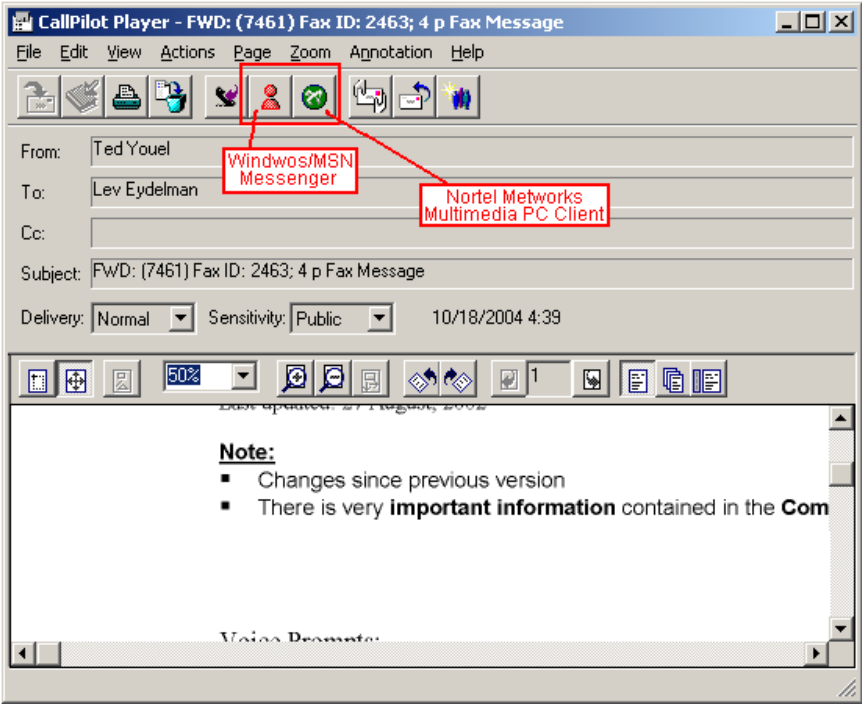
The image shows the 'CallPilot Desktop Messaging Properties' dialog box with the 'General' tab selected. The dialog has a blue title bar and a standard Windows-style border. Inside, there are several fields and checkboxes. The 'Server' field is a dropdown menu showing 'bvwlab337srv'. The 'VIM network shortcut' field is a dropdown menu showing '16139337'. The 'Mailbox' field is a dropdown menu showing '3396012'. The 'Password' field is a text box, and there is a 'Remember password' checkbox which is unchecked. A 'Change password...' button is located to the right of the password field. Below these fields is a 'My CallPilot URL:' label followed by a text box. At the bottom, there is a section titled 'Instant Messaging Applications' containing two checkboxes: 'Use Windows/MSN Messenger' and 'Use Nortel Multimedia PC Client', both of which are unchecked. At the very bottom of the dialog are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.

Field	Value
Server	bvwlab337srv
VIM network shortcut	16139337
Mailbox	3396012
Password	
Remember password	<input type="checkbox"/>
My CallPilot URL	
Use Windows/MSN Messenger	<input type="checkbox"/>
Use Nortel Multimedia PC Client	<input type="checkbox"/>

- By default, both applications are not selected. You cannot select an application that is not installed on your PC.

## Using Instant Messaging from the CallPilot Form

You can initiate an instant messaging session through the CallPilot Form. When the CallPilot Form is open, choose the **Contact Sender** menu item from the **Actions** menu, or click one of the **CallPilot Form** toolbar buttons.



When **Contact Sender** is chosen, the CallPilot Instant Messaging Verification dialog box appears, the user chooses a sign in name for the Instant Messaging service.

**Note:** The Instant Messaging icons on the toolbar are different colors, depending on the online status of the sender. These are as follows:



Online



Offline



Status or sender Sign In name Unknown to Windows/MSN Messenger



Online



Offline



Status or sender Sign In name Unknown to Nortel Multimedia PC Client (MCS5100)

Tool tips for Instant Messaging buttons will also show sender's Sign In name and online status, if this information is available.

## Using Instant Messaging from Lotus Notes

You can initiate an Instant Messaging session by selecting a message and choosing the



**Contact Sender** menu item from the **Tools-> CallPilot Desktop Messaging Tools** menu.

When **Contact Sender** is chosen, CallPilot retrieves the message sender's CallPilot or e-mail address. You are prompted to validate the address in the **Contact** dialog box.

### CallPilot Contact dialog box

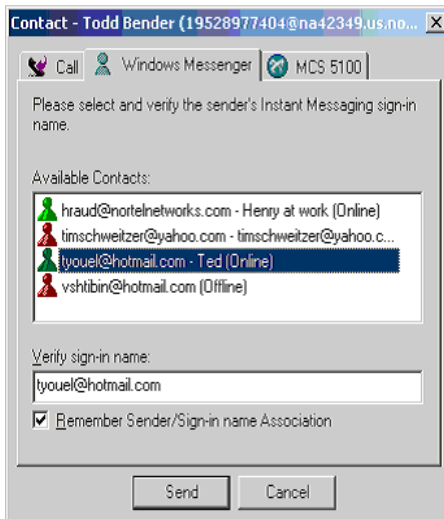
With the CallPilot **Contact** dialog box, you can initiate an Instant Messaging session by using **Windows Messenger> MSN Messenger** application, or by using the **Nortel Multimedia PC Client (MCS 5100)**. At this point, you can contact the sender by making a phone call (such as by pressing the **Call** button).

The **Contact** dialog box displays your Contacts list from either Windows/MSN Messenger application or the Friends list from Multimedia PC Client.

Both **Windows> MSN Messenger** application and the **Nortel Multimedia PC Client** require the sender's Sign In name to be present in the **Contacts> Friends** list before initiating an Instant Messaging session.

The sender's CallPilot or e-mail address that is extracted from the message is treated as the sender's Instant Messaging Sign In name. The **Contact** dialog box attempts to find the sender's Sign In name in the appropriate list. If the search is successful, the Verify sign in name text box is prefilled. Otherwise the text box is left empty and you must manually enter the sender's Sign In name.

You are always prompted by the **Contact** dialog box to validate the sign in name before starting an Instant Messaging session. Any changes made to the number are cached in the registry, if **Remember changes** is selected.



After verifying the sign in name, click the **Send** button. If the Sign In name is already in the contact list, the **Windows> MSN Messenger**, or the **Nortel Multimedia PC Client Conversation** window, is displayed.

This window provides the interface for sending and receiving instant messages.

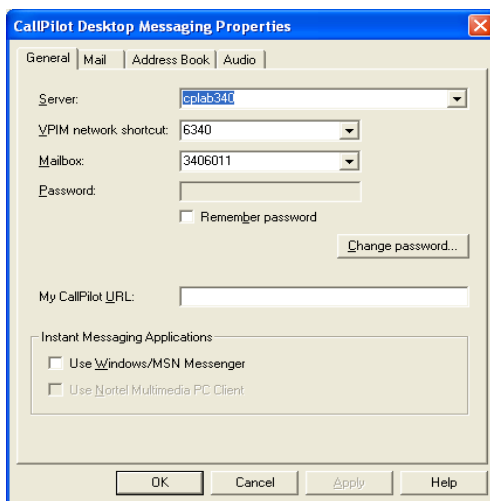
If the sign in name does not exist in your **Contact> Friend** list, CallPilot Desktop Messaging attempts to add it. If the name is successfully added, you will receive a confirmation. You can then click the **Send** button to display the **Windows> MSN Messenger** or **Nortel Multimedia PC Client Conversation** dialog box. If the name is not added successfully, the Send is aborted.

# Changing your mailbox settings

## To view or change your CallPilot access settings

Your administrator enters the default CallPilot access information for you. You can change these settings, if required. Refer to the online Help for a detailed explanation.

- 1 In your Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging > CallPilot Configuration**.  
OR  
On the CallPilot Player, select **View > Options**.
- 2 Click the **General** tab to display your current access settings.
- 3 Make any changes required, then click **OK**.



## To change your CallPilot password

This is the same password that you use on the telephone.

- 1 Repeat steps 1 and 2 above, then click **Change Password**.
- 2 In the **Old password** text box, type your current password.
- 3 In the **New password** text box, type your new password.
- 4 In the **Retype new** text box, type your new password again.
- 5 Click **OK** to save the change.
- 6 Click **OK** to exit the General settings.

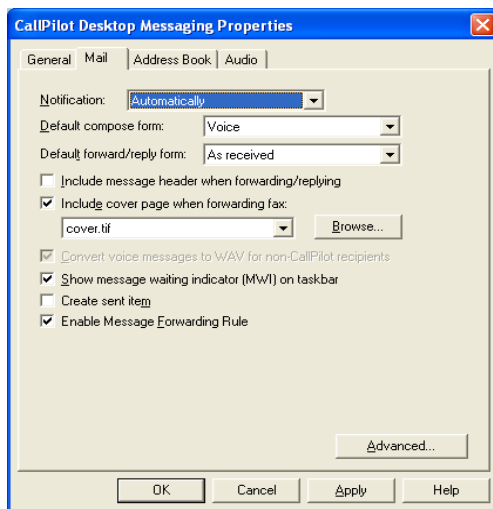


# Changing mail delivery settings

## To view or change your mail settings

Your administrator enters the default mail settings for you. You can change them, if required. Refer to the online Help for a detailed explanation.

- 1 In your Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging > CallPilot Configuration**.
- 2 Click the **Mail** tab to display the current mail settings.



- 3 The following settings are available:
  - Notification - You can set CallPilot to update your message list automatically, manually, or at intervals such as every five minutes. (Choose **Manually** to save costs on long distance or ISDN connections.)
  - Include a message header when forwarding/replying - The header information of the original message appears in a reply or forwarded message.
  - Include a cover page when forwarding a fax - Refer to the "CallPilot Configuration" section on page 27 for information regarding on adding or modifying cover pages.
  - Convert voice messages to WAV for non-CallPilot users - Your recorded messages are automatically converted from .vbk to .wav files when you send them to non-CallPilot users.
  - Show message waiting indicator (MWI) on taskbar - The CallPilot telephone icon on the Windows taskbar turns red when you have a new message.
  - Create a sent item - A copy of each sent message is stored in the Sent folder.

- Enable Message Forwarding Rule - enables the forwarding of messages as defined by the CallPilot Administrator. If the Message Forwarding Rule feature is not activated for the user, the checkbox does not appear.

Note: If you have access to My CallPilot, you can create, edit and delete your own Message Forwarding Rule. Refer to the My CallPilot User Guide for details.

- 4 Click **OK**.

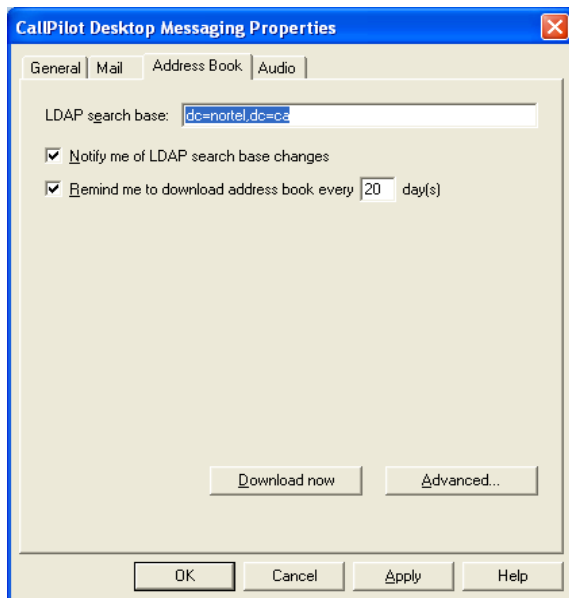
# Changing your Address Book settings

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## To view or change your Address Book settings

Your administrator enters the default Address Book settings for you. You can change the Address Book settings, if required. Refer to the online Help for a detailed explanation.

- 1 In your Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging > CallPilot Configuration**.
- 2 Click the **Address Book** tab to display the current Address Book settings.
- 3 Make any changes required, then click **OK**, or proceed to download your Address Book as described below.



## To download the Address Book to your computer

You can download the names and addresses of CallPilot users to your Personal Address Book.

- 1 In your Inbox, on the Actions menu, click **CallPilot Desktop Messaging > CallPilot Configuration**.
- 2 Click the **Address Book** tab.
- 3 Check the **Remind me...** checkbox and set the number of days between reminders.
- 4 Click **Download Now**.
- 5 Click **OK**.

# Changing audio settings

## To change the audio device and volume

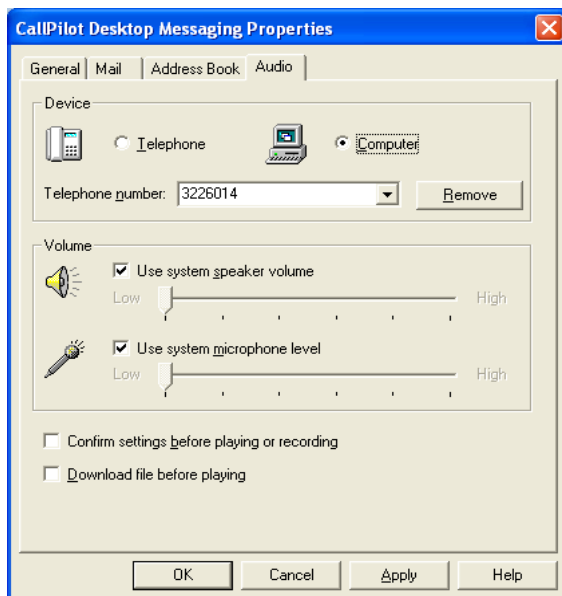
You can play and record your messages from your telephone or your computer.

- 1 In your Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging > CallPilot Configuration**.

*Or*

On the CallPilot Player, select **View > Options**.

- 2 Click the **Audio** tab to display the current Audio settings.



- 3 In Device, select **Telephone** if you want to play and record your voice messages from your telephone. Make sure the correct telephone number appears.

*Or*

Select **Computer** if you want to play and record your voice messages through your computer speakers and microphone.

**Note:** You can change your audio device on the CallPilot Player also.

- 4 In Volume, check the two Volume check boxes if you want to coordinate your CallPilot volume settings with your computer speaker and microphone volumes.
- 5 If you want a reminder to check these settings before playing or recording voice messages, check **Confirm settings...**
- 6 If you want to download voice messages to your computer before playing them, check **Download file...** This option is useful if you use a modem.

# Linking to My CallPilot

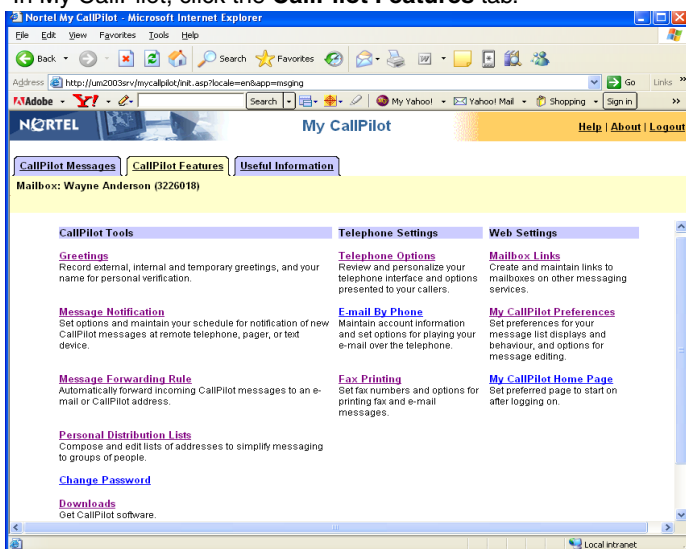
Desktop Messaging provides links to the web-based resources in My CallPilot. To view or change the URL for My CallPilot, see *Changing your mailbox settings*, on page 47. For more information on My CallPilot, refer to the *My CallPilot User Guide* 555-7101-426.

- 1 In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging Tools > My CallPilot**.
- 2 Select one of the tabs.

**Note:** You can also access My CallPilot from the View menu of the downloadable CallPilot Player.

## To view or change your CallPilot feature settings

- 1 In My CallPilot, click the **CallPilot Features** tab.





- 2 Select any feature, and make changes to your setup, as required. Any changes you make to a feature take effect immediately, whether you use CallPilot from your computer or from your telephone.

## To view user information

In My CallPilot, click the **Useful Information** tab to view online user information



specific to your mailbox.



My CallPilot

Help | About | Logout

CallPilot Messages

CallPilot Features

Useful Information

Mailbox: Anh Tong (3396040)

Your Mailbox Status

1. Your mailbox can store approximately **10** minutes of audio.

2. Voice messages are deleted **1** days after listening to them.

3. Read faxes are deleted after **1** days.

4. When your mailbox is full, your call answering is **not blocked**.

5. Messages that you send **are not saved** in your mailbox.

6. The maximum length of an outgoing message is **10** minutes.

7. An incoming message can be no longer than **6** minutes.

8. Your password was last changed **Monday, May 02, 2005**.

CallPilot Access Numbers

1. Voice Messaging:	(Not Available)
2. Express Voice Messaging:	(Not Available)
3. Speech Activated Messaging:	(Not Available)
4. Name Dialing:	(Not Available)
5. Default Fax Number:	(Not Available)
6. Fax Messaging:	(Not Available)
7. Express Fax Messaging:	(Not Available)
8. Dial Prefix:	(Not Available)
9. Area Code:	(Not Available)
10. Exchange:	(Not Available)
11. ESN Access Code:	(Not Available)
12. ESN Exchange:	(Not Available)

Need More Help?

No CallPilot support information has been defined.

CallPilot User Documentation

# Working offline

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To work offline, you require a computer that has CallPilot installed and configured in the same way as your office computer. You can download your messages and addresses to this computer before working offline.

- 1 (Optional) You can download your CallPilot messages to the computer that you will use offline. Log in to your e-mail and CallPilot. On the **Tools** menu, click **CallPilot Desktop Messaging**, then click **Download all CallPilot Messages**. When your messages are downloaded, log out.
- 2 (Optional) You can download the server Address Book to your computer. See *Changing your Address Book settings*, on page 50.
- 3 Open your e-mail, while not connected to the network, and wait for the CallPilot Logon window to appear. You do not need to enter your password.
- 4 Click **Cancel**.

You can then work offline, reviewing your messages, and recording and addressing new messages. You must use your computer speakers and microphone to play and record messages offline; you cannot use a telephone for offline access.

CallPilot stores your recorded messages, and sends them the next time you log in to the CallPilot server.

## CallPilot Desktop Messaging User Guide for Lotus Notes

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