



Nortel 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:

[www.nortel.com/support](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:

[www.nortel.com/callus](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:

[www.nortel.com/erc](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.



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# Using Desktop Messaging for Lotus Notes

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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.
- Spell-check messages before you send them.
- Add voice, fax, or text file attachments to messages.
- Address messages to CallPilot users on local and remote servers, as well as to non-CallPilot addresses.
- 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, see the *Feature availability* topic in the Desktop Messaging online help, or ask your administrator.

## Getting started

### 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, see 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, 6.5, and 7.0 Groupware e-mail client
- Windows 2000 Professional, Windows XP, and Windows Vista
- 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
- For My CallPilot access:
  - For Windows: Internet Explorer 6.0 and 7.0, Firefox 2.0 for Windows
  - For Macintosh: Safari 1.3.2 for Macintosh OS X
  - For Linux: Mozilla 1.7.x, Firefox 2.0

For updates on the latest supported versions, contact your CallPilot administrator.

## 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.

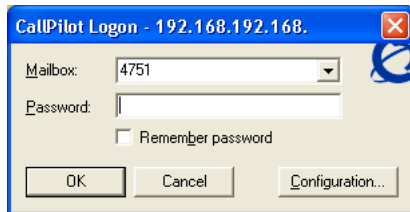
When a Lotus Notes Client starts for the first time after the server configuration is completed, CallPilot Desktop Messaging detects updated mail database, makes all required modifications in the Lotus Notes client initialization file (NOTES.INI), and prompts the user to finalize the configuration by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

## Logging on

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

### To log on from Lotus Notes

To log on to CallPilot from Lotus Notes, follow these steps.

| Step                                                                                                                                                                                                                                                                                                                                                                                                         | Action                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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. |
|  <p>The image shows a 'CallPilot Logon' dialog box with a title bar 'CallPilot Logon - 192.168.192.168.'. It contains a 'Mailbox:' label with a dropdown menu showing '4751', a 'Password:' label with a text input field, a 'Remember password' checkbox, and three buttons: 'OK', 'Cancel', and 'Configuration...'.</p> |                                                                                                                                                                   |
| 2                                                                                                                                                                                                                                                                                                                                                                                                            | In the <b>Mailbox</b> box, type or select your mailbox number.                                                                                                    |
| 3                                                                                                                                                                                                                                                                                                                                                                                                            | In the <b>Password</b> box, type your CallPilot password.                                                                                                         |
| 4                                                                                                                                                                                                                                                                                                                                                                                                            | Check <b>Remember password</b> if you want CallPilot to log in automatically.                                                                                     |
| 5                                                                                                                                                                                                                                                                                                                                                                                                            | Click <b>OK</b> .                                                                                                                                                 |

—End—

**Note 1:** Do not leave the **Remember password** box checked on a shared computer.

**Note 2:** CallPilot Desktop Messaging supports multiple Lotus Notes logons 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:

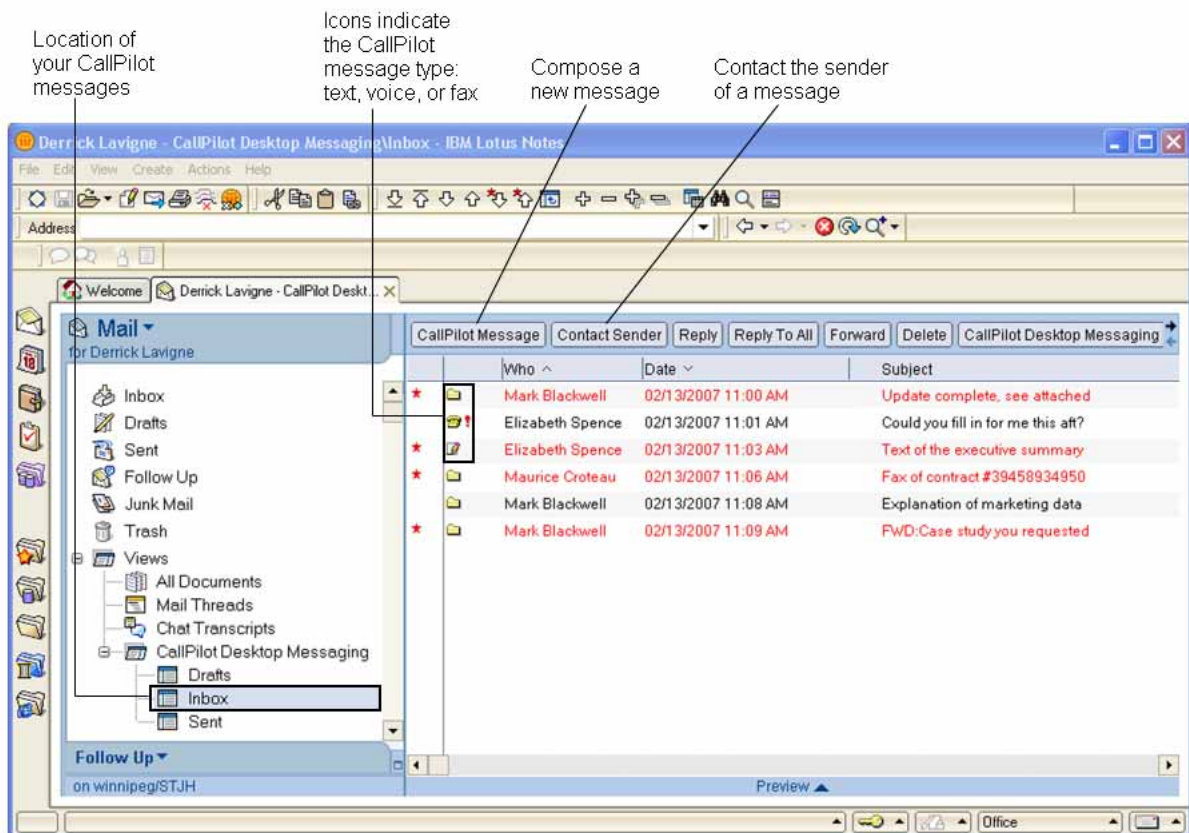
| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | <i>Accessing the CallPilot Desktop Messaging view in the different Lotus Notes mail database.</i> 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 <b>Yes</b> 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    | <i>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.</i> 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.

—End—

## Working with your CallPilot messages

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



## To check for new messages



The CallPilot Message Waiting Indicator in the notification area of your taskbar turns red and notifies you when you have a new message. For more tips on using the Message Waiting Indicator or to turn it off, see ["Using the Message Waiting Indicator" \(page 48\)](#). New messages appear in red.

### To open a message

To open a CallPilot message, double-click the message line. See ["Playing voice messages" \(page 15\)](#), and ["Viewing fax messages" \(page 16\)](#).

### To delete a message



Click a CallPilot message in your inbox to select it, and then click the **Delete** icon on the toolbar.

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

### Marking CallPilot messages as read or unread

In your inbox, unread messages appear in red text and read messages appear in black text. You can change whether a message is marked as read or unread. These changes also affect your Message Waiting Indicator. For example, if you have no unread messages, and you then mark one as unread, your Message Waiting Indicator turns back on.

---

| Step | Action |
|------|--------|
|------|--------|

---

- |   |                                                                            |
|---|----------------------------------------------------------------------------|
| 1 | Open your CallPilot inbox and select one or more messages.                 |
| 2 | Choose <b>Actions &gt; CallPilot Desktop Messaging &gt; Unread Marks</b> . |
| 3 | Choose either <b>Mark Selected Unread</b> or <b>Mark Selected Read</b> .   |
- 

—End—

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### To mark all messages as read or unread

---

| Step | Action |
|------|--------|
|------|--------|

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- |   |                                                                                                           |
|---|-----------------------------------------------------------------------------------------------------------|
| 1 | Open your CallPilot inbox, and choose <b>Actions &gt; CallPilot Desktop Messaging &gt; Unread Marks</b> . |
| 2 | Choose either <b>Mark All Unread</b> or <b>Mark All Read</b> .                                            |
- 

—End—

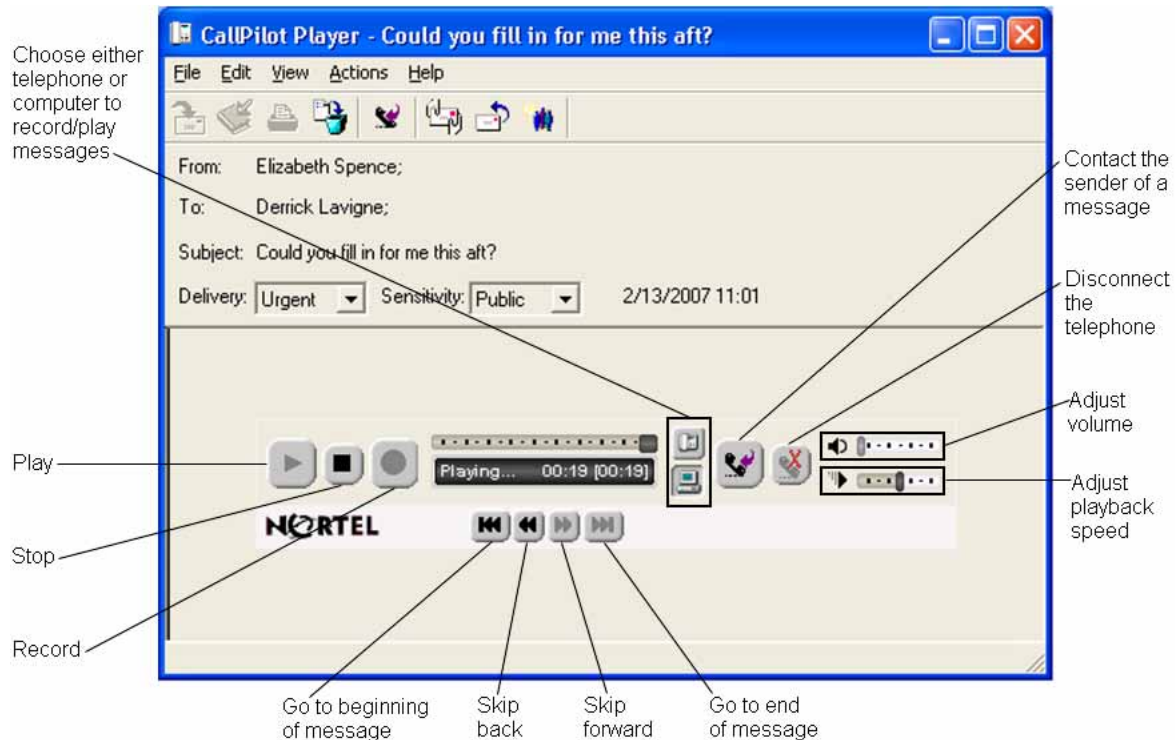
---

## 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.

The following illustration shows the controls you use on the CallPilot Player to work with voice messages.



### 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" \(page 56\)](#). You can also click the Telephone or Computer icon on the CallPilot Player to change the setting.

### To play a message from your telephone

| Step | Action                                                                                                                                                                       |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 options on the CallPilot Player to play or stop the message, go backward and forward, and call the sender.
- 3 When you finish, hang up, and close the message.

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—End—

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### To play a message from your computer

| Step | Action                                                                                                                                                                                             |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | To play a voice message when your computer is selected for playback, double-click the message in your CallPilot Inbox.<br><br>The message plays through your computer speakers or your headphones. |
| 2    | Use the options 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.                                                                                                                                                         |

---

—End—

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## Viewing fax messages

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

### To view a fax message

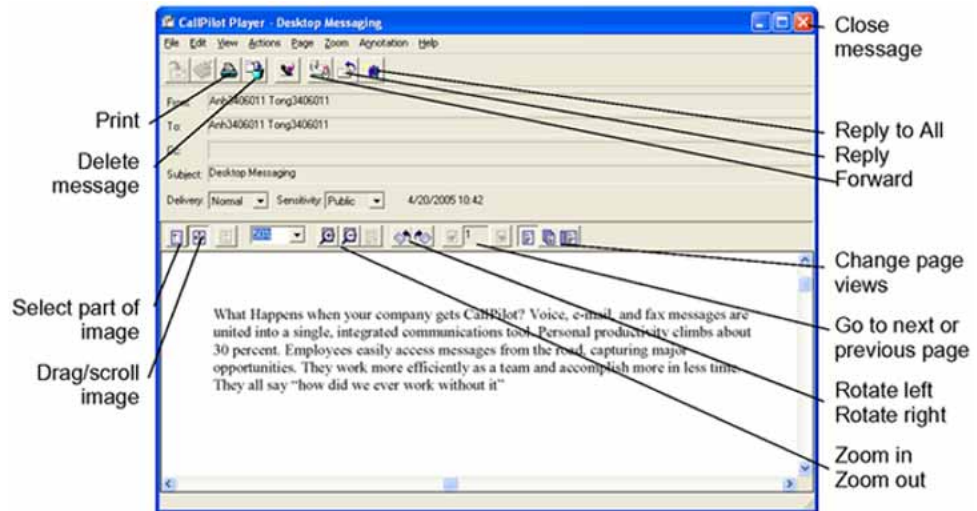
| Step | Action                                                                                                                                                                                    |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 finish, close the message.                                                                                                                                                       |



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—End—

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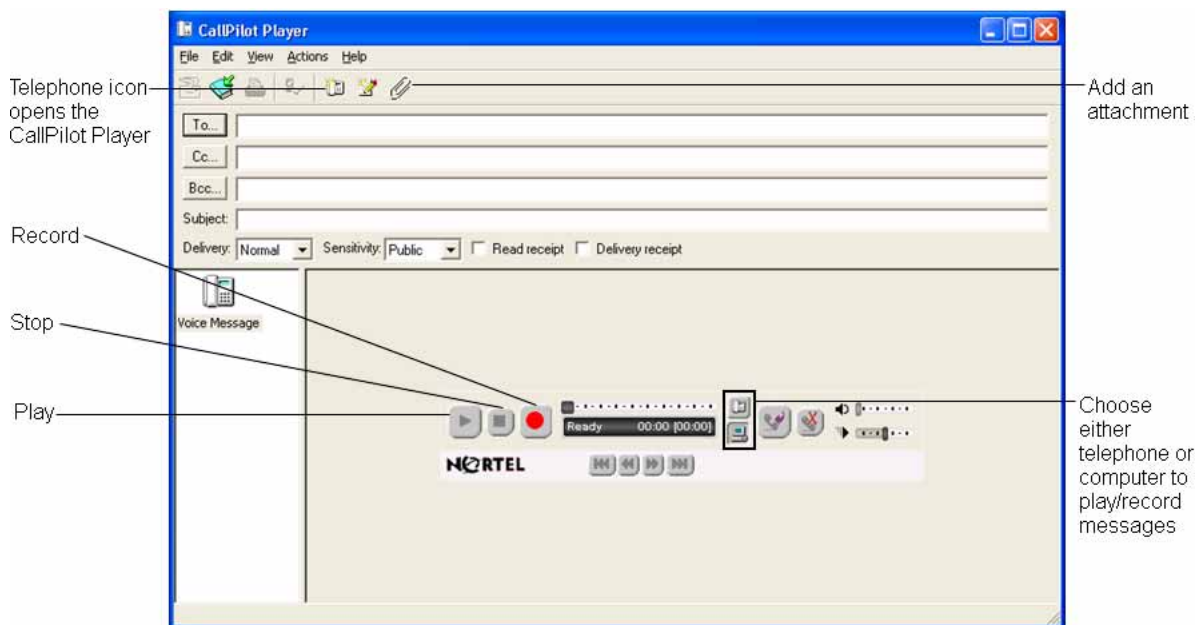


## Composing voice messages

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

| Step | Action                                                                                                                     |
|------|----------------------------------------------------------------------------------------------------------------------------|
| 1    | In your CallPilot inbox, click <b>CallPilot Message</b> .<br>The CallPilot message form with the CallPilot Player appears. |



**Note:** If the CallPilot Player is not already open, in the new message form, click the Telephone icon in the toolbar to open it.

- 2 Choose how you want to record the voice message: On the CallPilot Player panel, click either the telephone or computer icon.
- 3 To start recording, click the red **Record** button.
- 4 Do one of the following:
  - 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, and 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 To address the message from an address book, click **To**. Alternatively, type a formatted address in the **To** box. For more information about addressing options, see ["Addressing messages" \(page 41\)](#).
- 6 Add attachments and options if required. See ["Adding attachments to messages" \(page 38\)](#), and ["Setting message options" \(page 38\)](#).
- 7 On the toolbar, click the **Send Message** icon.

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—End—

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

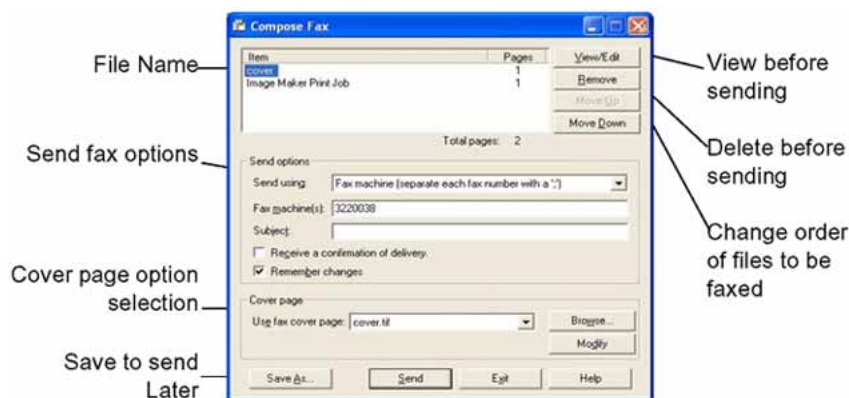
| Step  | Action                                                                                                                                                                                                               |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1     | On a new message form, record a message.                                                                                                                                                                             |
| 2     | On the <b>File</b> menu, click <b>Save as</b> .                                                                                                                                                                      |
| 3     | In the <b>File name</b> box, type a name for the file, and then select a folder in which to keep the file.                                                                                                           |
| 4     | Click <b>Save</b> . Save voice files as VBK files. CallPilot can automatically convert VBK files to WAV files when sending to non-CallPilot users. See <a href="#">"Changing mail delivery settings" (page 52)</a> . |
| —End— |                                                                                                                                                                                                                      |

## 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.

| Step | Action                                                                                                                                                                                                     |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | Start the application you want to use to create the fax, for example, Microsoft Word. The document you open or create must be no wider than 8.5 in. (21.5 cm).<br><br>Multiple page documents are allowed. |
| 2    | When the document is ready, on the File menu, click <b>Print</b> or whichever option opens the dialog box to allow you to select a printer.                                                                |
| 3    | From the list of printers, select <b>Nortel Fax</b> .                                                                                                                                                      |
| 4    | Click <b>Print</b> or <b>OK</b> , or whichever option sends the file to the printer you selected.<br><br>The Compose Fax dialog box appears.                                                               |



5 Before you send the fax, you can add more documents by repeating steps 1 to 4. You can also choose to include a cover page, view the fax, and save the fax as a file for later transmission.

6 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, and 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**, and then click **Send**.

A new message form opens with your fax file attached.

7 Address the message from the CallPilot, e-mail, or any address book. Alternatively, type the formatted address in the **To** text box. See ["Addressing messages" \(page 41\)](#).

8 Add a subject line, attachments, and options if required. See ["Adding attachments to messages" \(page 38\)](#), and ["Setting message options" \(page 38\)](#).

9 Click the **Send Message** icon.

---

—End—

---

**Note:** You can also send a fax message by creating a fax TIFF-F file and then adding it as an attachment to a CallPilot message.

## To create and send a text message

| Step  | Action                                                                                                                          |
|-------|---------------------------------------------------------------------------------------------------------------------------------|
| 1     | In your CallPilot inbox, click <b>CallPilot Message</b> .                                                                       |
| 2     | Click the <b>Text</b> icon in the toolbar.<br> |
| 3     | Type or paste plain text into the message.                                                                                      |
| 4     | Address the message and add a subject.                                                                                          |
| 5     | Click the <b>Send Message</b> icon.                                                                                             |
| —End— |                                                                                                                                 |

## 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. 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.

## To access and modify the example Data source document

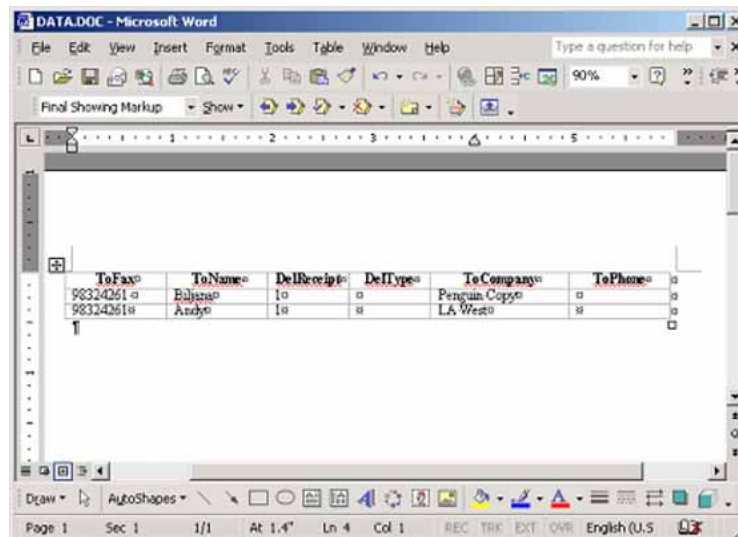
The Data.doc file consists of a Microsoft Word table, organized in columns, with one row for each recipient. The following column headers exist in the sample: ToFax, ToName, DelReceipt, DelType, ToCompany, and ToPhone. These column headers can be modified and deleted, and new columns can be added. The 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.

---

**Step    Action**


---

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



- 2 Add new columns or subtract existing ones, as required. For new columns, choose 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 in 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. 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, 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, 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, the message is tagged for Economy delivery. If DelType is set to 2, 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:** 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.

---

—End—

---

### To access and modify the example Main document

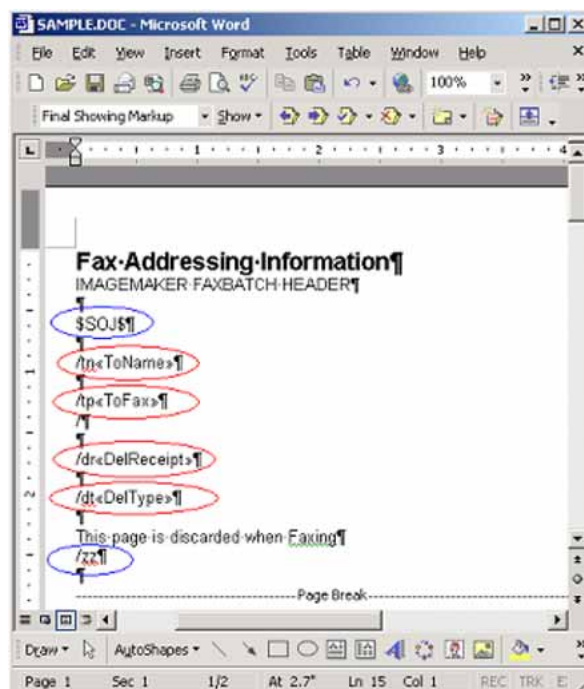
The Sample.doc file is an example of a Microsoft Word main document.

1. From the \Program Files\Nortel\CallPilot\fax 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 FaxBatch 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>>

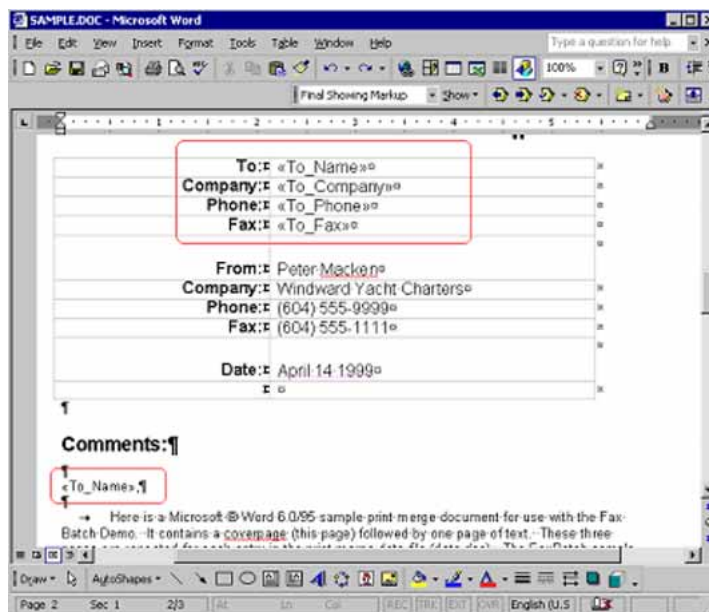
In this example, a 9 is added to the beginning of each phone number during fax batch processing. The data source remains unchanged, and can be used from a different location that does not require a 9 for external access.

### 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.

### To merge data from the data source document into the main document

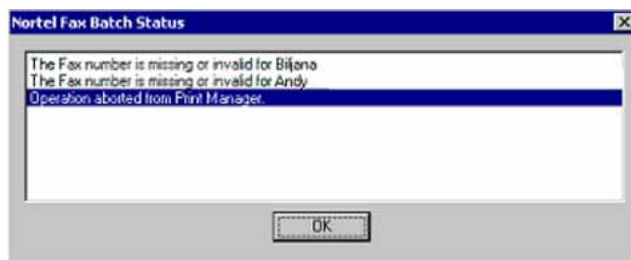
When you are ready to merge data from the data source file into your main document:

| Step  | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1     | <p>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.</p> <ul style="list-style-type: none"> <li>a. In Office XP, select <b>Tools &gt; Letters and Mailings &gt; Mail Merge Wizard</b>.</li> <li>b. In Office 2000 select <b>Tools &gt; Mail Merge</b>.</li> <li>c. In Office 2007, select <b>Mailings &gt; Start Mail Merge &gt; Step by Step Mail Merge Wizard</b>.</li> </ul> |
| 2     | Verify that Sample.doc is currently selected as the main document, and that Data.doc is currently selected as the data source.                                                                                                                                                                                                                                                                                                                                                                    |
| 3     | <p>Select <b>Merge to Printer</b>, and then select the Nortel Fax Batch driver in the Print dialog box that appears.</p> <p><i><b>Note:</b> Ensure that Microsoft Word is not set up to print pages in reverse order.</i></p>                                                                                                                                                                                                                                                                     |
| 4     | Click <b>OK</b> in the Print dialog box to initiate the batch fax process.                                                                                                                                                                                                                                                                                                                                                                                                                        |
| —End— |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

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 appears 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:

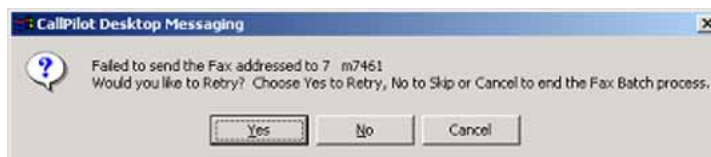


Problems, such as a missing fax address or an unsupported fax address format, are checked. However, problems such as a wrong fax number are not identified, provided the number is in a valid format. A wrong fax number, however, results in the sending of a non-Delivery receipt to the user's CallPilot mailbox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

When you click **OK**, 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

You can choose to include a cover page with your faxes. The server administrator typically designs and manages these cover pages, but you can choose 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 |         |

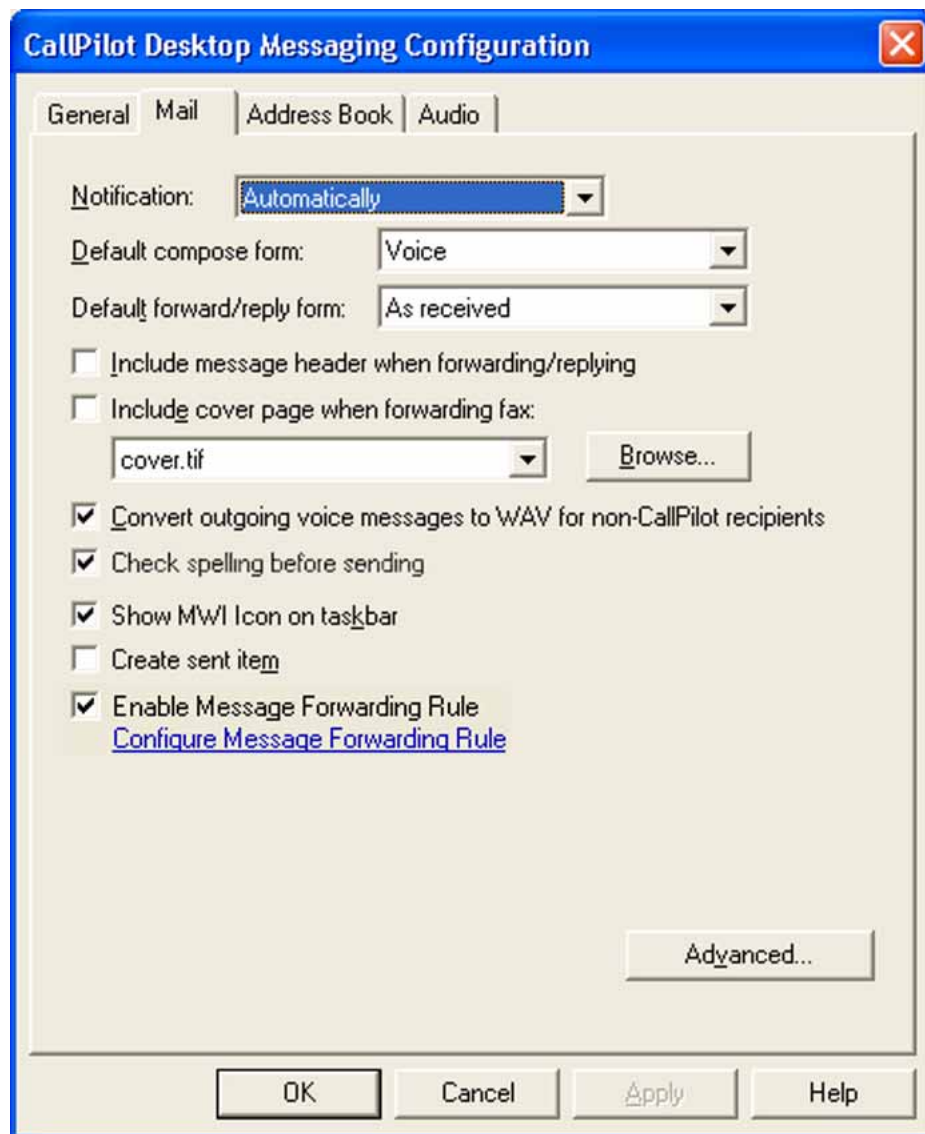
Number of Pages

Sent Date & Time

A Cover Sheet Memo section

### To include a cover page in a fax message

On the Mail tab of the CallPilot Desktop Messaging Configuration dialog box, there is an option labeled Include cover page when forwarding fax. By default, this option is cleared.

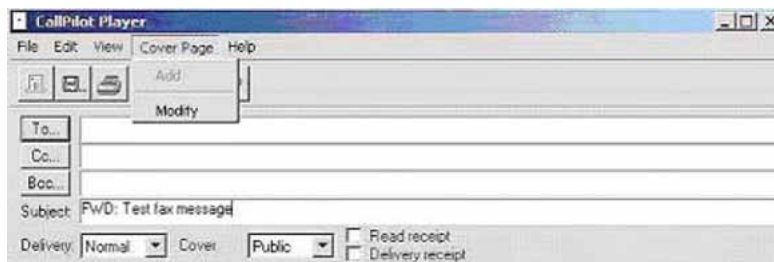


If you select this option, you can then choose and set a default cover page from a list of available cover pages. Click Browse to choose the location where the cover pages are stored. The default location is:

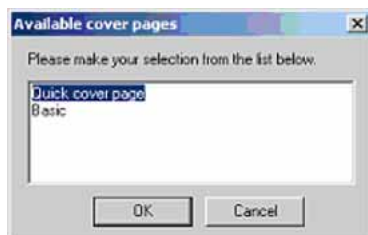
\\Program Files\\Nortel\\CallPilot\\cvrpages.

### To select the cover page you want to include

The CallPilot Player contains a menu item labeled Cover Page with options to Add and Modify.

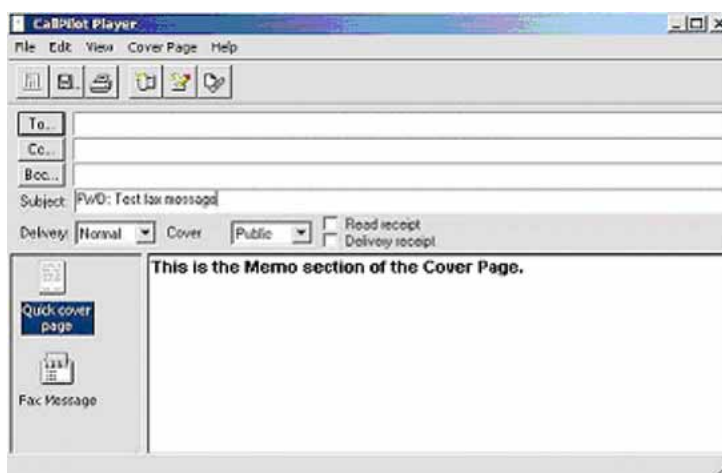


The Add menu displays a list of existing cover pages available to use. Select one, and then click OK.



The Modify menu displays the current cover page content and allows you modify it. In 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 driver 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. Choose Browse to browse for a cover page, 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. (See 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. 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.

### To modify and preview a 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: 5055555555 Phone: 5055555556

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.

**Cover Page Preview**

Page 1

**Facsimile Cover Sheet**

|          |              |             |            |
|----------|--------------|-------------|------------|
| To:      | Mr Jones     | From:       | Mr Jones   |
| Company: | Company Name | Department: | 445588     |
| Fax:     | 5055555555   | Phone:      | 9558889421 |

Pages including this cover page: 2 Sent: 5/19/2005 9:19 AM

**Memo**

This is the Memo section of the cover page.

Close

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

Using the Call Directory feature, you can 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.

You can use the Call Directory feature in the following scenarios:

#### When any CallPilot view is active

To access this feature, choose Actions > CallPilot Desktop Messaging > Call Directory when any CallPilot view is active. When you select the Call Directory menu item, the Call Directory dialog box appears. You can select any available Address Book, select the person, and then initiate the call by clicking Call.

Depending on the selected address book, CallPilot attempts to retrieve telephone numbers from different 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 you have the CallPilot Personal Address Book open or when you click Call. CallPilot attempts to retrieve telephone numbers from the CallPilot - Office Phone field.

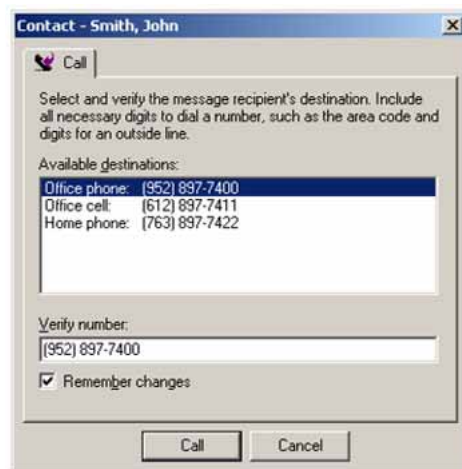
**When the Lotus Notes Public or Personal Address Books are open**

You can also use the Call directory feature when you have the Lotus Notes Public or Personal Address Books open. This requires the administrator to make certain changes on the Domino server.

- To call a person from the Lotus Notes Public Address Book, select a person, and then click Call 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, select a person, and then click Call 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. If you select the Remember changes check box, any changes you make to the number are cached in the registry.



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.

## Contacting the sender of a message

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

| Step | Action                                                   |
|------|----------------------------------------------------------|
| 1    | Select a message in your Lotus Notes or CallPilot inbox. |

| IF                                        | THEN                                                                       |
|-------------------------------------------|----------------------------------------------------------------------------|
| you selected a Lotus Notes e-mail message | Select <b>Actions &gt; CallPilot Desktop Messaging &gt; Contact Sender</b> |

**Note:** 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 not customized. If your mail templates are customized, copy the Contact Sender action from the

| IF                                                        | THEN                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                           | CallPilot mail database template to your customized template on the Domino server.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| you selected a CallPilot message in your CallPilot inbox  | Select <b>Actions &gt; CallPilot Desktop Messaging &gt; Contact Sender</b> or click <b>Contact Sender</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| you have a CallPilot message open in your CallPilot inbox | Select <b>Actions &gt; Contact Sender</b> or click <b>Contact Sender</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>2</b>                                                  | <p>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.</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul> <p>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.</p> |
| <b>3</b>                                                  | <p>Choose the appropriate number, and then click <b>Call</b>.</p> <p>If you select the Remember Changes check box, any changes you make are saved.</p> <p>CallPilot immediately calls the sender of the message.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>4</b>                                                  | Answer the telephone when the telephone rings.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>5</b>                                                  | When you finish the call, hang up the telephone, or click the <b>Disconnect</b> icon.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>—End—</b>                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

## Adding attachments to messages

Before you send 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" \(page 52\)](#). Fax files must be TIFF-F format. Text files must be TXT format.

| Step | Action |
|------|--------|
|------|--------|

- |   |                                                                                                                                                     |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | In a new CallPilot message, click the <b>Attach File</b> icon.<br> |
| 2 | In the <b>Open</b> dialog box, select or type the name of the files that you want to attach.                                                        |
| 3 | Click <b>Open</b> to attach the files and return to the new CallPilot message.                                                                      |

---

—End—

---

## Setting message options

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

### To set message options

| Step | Action |
|------|--------|
|------|--------|

- |   |                                                                                                                                                       |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | In a new CallPilot message, select <b>Delivery</b> , <b>Sensitivity</b> , and <b>Read receipt</b> , and <b>Delivery receipt</b> options, as required. |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------|

Delivery:  Sensitivity:  ☐ Read receipt ☐ Delivery receipt

- For **Delivery**, select **Urgent** or **Economy**, 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.

---

—End—

---

## 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

| Step  | Action                                                                                                                                                                  |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1     | In an open message, click <b>Forward</b> , <b>Reply</b> , or <b>Reply to All</b> .<br> |
| 2     | On the new message form, compose a voice, fax, or text message.                                                                                                         |
| 3     | Address forwarded messages the same way as a new message.<br>Replies are addressed automatically.                                                                       |
| 4     | Add attachments, set options, and change the subject line if required.                                                                                                  |
| 5     | Click <b>Send Message</b> .                                                                                                                                             |
| —End— |                                                                                                                                                                         |

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

## Setting up message forwarding

You can forward your CallPilot messages to another CallPilot mailbox or to an external e-mail address. To do this, you must create and enable a message forwarding rule, which is a set of criteria defining which messages to forward and where to forward them.

When you enable a message forwarding rule, you can then access all incoming messages that meet the criteria from another location, such as an Internet mailbox or a Personal Digital Assistant (PDA). Voice messages can be forwarded in the format in which they are received or converted to WAV format.

Either you or your CallPilot administrator can create a message forwarding rule. To create it yourself, you must use My CallPilot; however, you can enable and disable it through Desktop Messaging, My CallPilot, or using your telephone (option 8-5-1).

Lotus Notes users receive the forwarded messages in their Lotus 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 TIFF-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 a nondelivery notification. 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.

### To set up message forwarding

| Step | Action                                                                                                                                                                                                                                                                                  |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | In your e-mail inbox, on the <b>Actions</b> menu, choose <b>CallPilot Desktop Messaging &gt; Configuration</b> .                                                                                                                                                                        |
| 2    | Click the <b>Mail</b> tab.                                                                                                                                                                                                                                                              |
| 3    | To open My CallPilot, click the <b>Configure Message Forwarding Rule</b> item.                                                                                                                                                                                                          |
| 4    | If the Message Forwarding Rule Configuration page of My CallPilot does not appear automatically: <ul style="list-style-type: none"><li>a. Log on to My CallPilot.</li><li>b. Click the <b>CallPilot Features</b> tab, and then click the <b>Message Forwarding Rule</b> item.</li></ul> |



- 5 Configure a message forwarding rule. For step-by-step instructions, see the *Desktop Messaging User Guide for My CallPilot* (NN44200-109).

---

—End—

---

### To enable or disable message forwarding

A message forwarding rule must be configured before you can enable or disable it. See the preceding procedure if you want to configure it yourself, or ask your CallPilot administrator to configure one for you. For security reasons, you must enable and disable it yourself. You can do this in Desktop Messaging using the following procedure, or you can use the telephone (option 8-5-1).

If you have the Anonymous Logon option turned on, you cannot enable or disable a message forwarding rule using the Desktop Messaging software. (To check, click **Actions > CallPilot Desktop Messaging > Configuration**, and then click the **Address Book** tab. Click the **Advanced** option to view your configuration.)

---

| Step | Action                                                                                                           |
|------|------------------------------------------------------------------------------------------------------------------|
| 1    | In your e-mail inbox, on the <b>Actions</b> menu, choose <b>CallPilot Desktop Messaging &gt; Configuration</b> . |
| 2    | Click the <b>Mail</b> tab.                                                                                       |
| 3    | Select or clear the <b>Enable Message Forwarding Rule</b> check box.                                             |

---



---

—End—

---

## 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

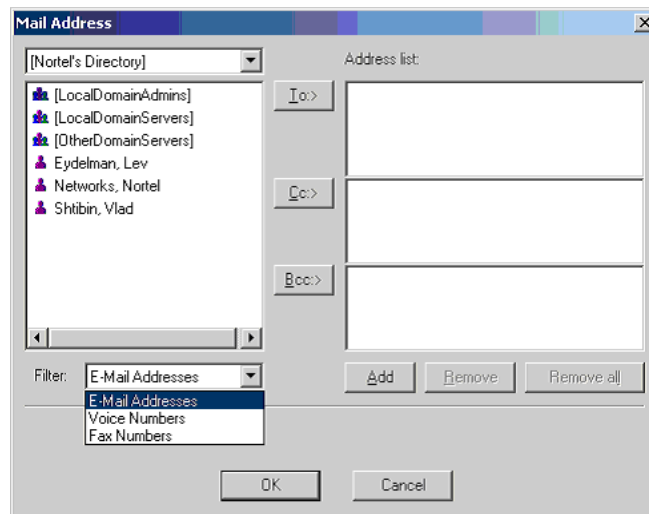
A Lotus Notes Public Address Book contains number information fields labeled Office phone and FAX phone. CallPilot users can directly access these numbers.

**Note:** In a Lotus Notes Personal Address Book, these fields are called Office phone and Office fax respectively.

| Step | Action |
|------|--------|
|------|--------|

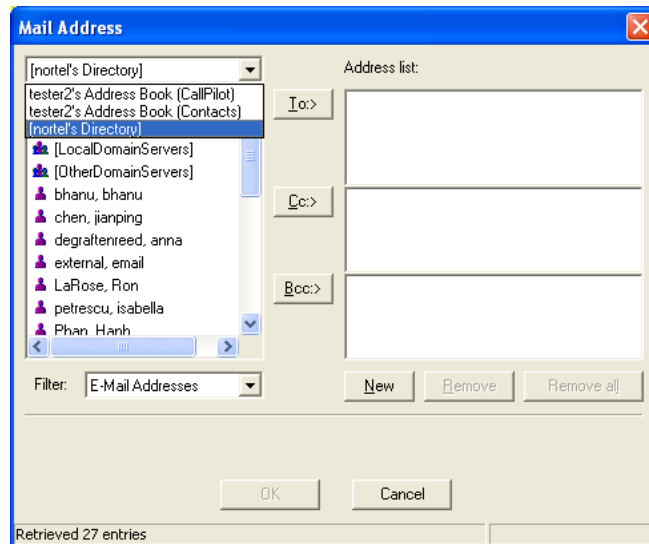
- |   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | In a new CallPilot message, click <b>To</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 2 | <p>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 appears. Using this control, you can specify what type of address to use.</p> <ul style="list-style-type: none"> <li>• If E-Mail Addresses is selected, the address list displays all names.</li> <li>• If FAX Numbers is selected, the address list displays names that have FAX phone information.</li> <li>• If VOICE Numbers is selected, the address list displays names that have Office phone information.</li> </ul> |

**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. If required, 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.




---

—End—

---

### 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.

If your site has more than one CallPilot server, your CallPilot administrator can expand your CallPilot Address Book to include the addresses of CallPilot users on networked servers, in addition to addresses on your local server. If you do not need this expanded list, you can configure your CallPilot Address Book to include only addresses from your local server. For more information, see ["Changing your Address Book settings"](#) (page 54).

Lotus Notes Desktop Messaging 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.

---

#### Step Action

---

- 1 In a new CallPilot message, click **To**.

- 2 From the list of available address books, select **Searchable CallPilot Directory**.

Additional controls are available to dynamically search for CallPilot addresses on the CallPilot server in a number of ways. For example:

- a. In the **Search for** list, select the search type **Last Name**.
- b. Enter a set of letters into the text box.
- c. Click **Search**. All records with the last name matching the letters are returned and appear 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. If required, 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.

---

—End—

---

### To address a message manually

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" \(page 54\)](#).

### 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 nondelivery 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.

| Step | Action                                                                                                                                  |
|------|-----------------------------------------------------------------------------------------------------------------------------------------|
| 1    | In your Lotus Notes inbox, click <b>Address Book</b> .                                                                                  |
| 2    | Select <b>Groups (CallPilot)</b> , and then click <b>Add Group</b> or <b>New Group</b> .                                                |
| 3    | Type a Group Name and Description, and then click the arrow beside <b>Members</b> .                                                     |
| 4    | In your Personal Address Book, place a check mark beside each name that you want to add to the group. Click <b>OK</b> to exit the list. |
| 5    | Click <b>Save</b> or <b>Save and Close</b> .                                                                                            |

—End—

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

## Using instant messaging

Using the instant messaging feature, you can start an instant messaging (IM) session through Microsoft Windows/MSN Messenger or the 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

| Step  | Action                                                                                                                                                                                                                                     |
|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1     | Open your CallPilot Desktop Messaging inbox.                                                                                                                                                                                               |
| 2     | On the <b>Actions</b> menu, choose <b>CallPilot Desktop Messaging &gt; Configuration</b> .                                                                                                                                                 |
| 3     | On the <b>General</b> tab, select the instant messaging application you want to use. Your choices are: <ul style="list-style-type: none"><li>• <b>Use Windows/MSN Messenger</b></li><li>• <b>Use Nortel Multimedia PC Client</b></li></ul> |
| 4     | Click <b>OK</b> .                                                                                                                                                                                                                          |
| 5     | Close Lotus Notes and then reopen it so that the changes take effect.                                                                                                                                                                      |
| —End— |                                                                                                                                                                                                                                            |

### To use instant messaging from an open CallPilot message

You can initiate an instant messaging session when you have a CallPilot message open.

| Step  | Action                                                                                                                                                                                                                                                                                                                                                                                      |
|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1     | In an open CallPilot message, on the toolbar, click the icon representing the instant messaging software you want to use: <div style="margin-top: 10px;">  Windows/MSN Messenger<br/>  Nortel Multimedia PC Client </div> |
| 2     | Sign in, if required.<br>If the message sender is online, an instant message session starts. If not, the Contact dialog box appears.                                                                                                                                                                                                                                                        |
| 3     | Click the tab for the instant messaging software.<br>It displays your Contacts list from Windows/MSN Messenger application, or your Friends list from the Nortel Multimedia PC Client application.                                                                                                                                                                                          |
| 4     | Select and verify the instant messaging address, or type the correct sign-in name.                                                                                                                                                                                                                                                                                                          |
| 5     | Click <b>Send</b> to begin the session.                                                                                                                                                                                                                                                                                                                                                     |
| —End— |                                                                                                                                                                                                                                                                                                                                                                                             |

**Note:** The instant messaging icons on the toolbar are different colors, depending on the online status of the sender:

|                                                                                     |        |                                                                                     |         |                                                                                     |                                                                                       |
|-------------------------------------------------------------------------------------|--------|-------------------------------------------------------------------------------------|---------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
|  | Online |  | Offline |  | Status or sender Sign In name<br>Unknown to Windows/MSN<br>Messenger                  |
|  | Online |  | Offline |  | Status or sender Sign In name<br>Unknown to Nortel Multimedia<br>PC Client (MCS 5100) |

Tool tips for instant messaging buttons show the sender's sign in name and online status, if this information is available.

### To use instant messaging from Lotus Notes

| Step | Action                                                         |
|------|----------------------------------------------------------------|
| 1    | From your CallPilot Desktop Messaging inbox, select a message. |

- 2 On the **Actions** menu, choose **CallPilot Desktop Messaging > Contact Sender**.

CallPilot retrieves the message sender's CallPilot address, and then the Contact dialog box appears.

- 3 Click the tab for the instant messaging software.

It displays your Contacts list from Windows/MSN Messenger application, or your Friends list from the Nortel Multimedia PC Client application.

- 4 Select and verify the instant messaging address, or type the correct sign-in name.

- 5 Click **Send** to begin the session.

---

—End—

---

## Using the Message Waiting Indicator

Desktop Messaging includes a Message Waiting Indicator (MWI) that appears as a telephone handset icon in the lower-right corner of your screen, in the Windows taskbar or system tray. The Message Waiting Indicator notifies you if you have new messages and provides you with quick access to your inbox.

A red telephone handset icon indicates that you have new messages:



The appearance of the Message Waiting Indicator icon changes to give you additional information about your connection to the server as follows:



You are not logged on to CallPilot



You are logged on, but you have no new messages



There is a communication problem with the server

## To configure the Message Waiting Indicator

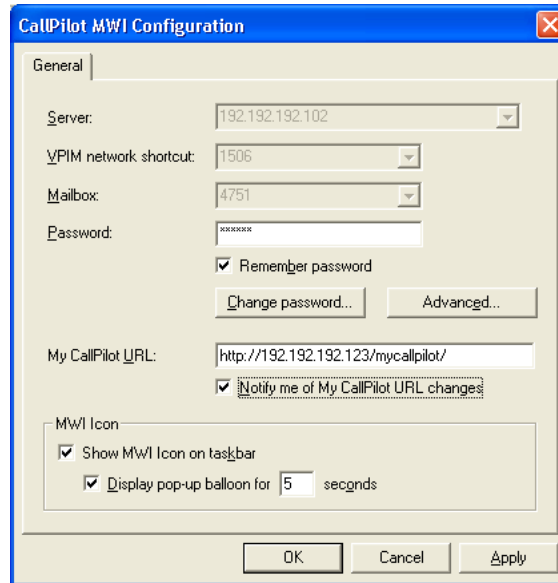
Use the CallPilot MWI Configuration dialog box to

- show or hide the Message Waiting Indicator
- enable and disable its pop-up balloon text
- control how long the balloon text stays on the screen



- | Step | Action                                                                  |
|------|-------------------------------------------------------------------------|
| 1    | In the Windows taskbar, right-click the Message Waiting Indicator icon. |
| 2    | Click <b>CallPilot MWI Configuration</b> .                              |

The CallPilot MWI Configuration dialog box appears.



**Note:** The first three boxes (Server, VPIM network shortcut, and Mailbox) are for information only and they appear dimmed; if you want to change information in these boxes, you can access them on the General tab at Actions > CallPilot Desktop Messaging > Configuration.

- 3 If you want to open My CallPilot and play your latest message by double-clicking the icon, ensure that the **My CallPilot URL** box contains the correct URL. You must be connected to a CallPilot 5.0 or later server for this to work.

Ask your CallPilot administrator for the correct URL. Typically, the URL appears in one of the following formats:

- `http://prefix.hostname.com/mycallpilot/`
- `http://IP address/mycallpilot/`

- 4 To show or hide the MWI icon, select or clear the **Show MWI Icon on taskbar** check box.

**Note:** If you hide the icon and then decide you want to show it again, from the Windows Start menu, choose Programs > Nortel > CallPilot MWI Icon. The icon reappears in the taskbar.

- 5 To enable or disable the balloon text, select or clear the **Display pop-up balloon for x seconds** check box. You can also change the number of seconds the balloon text appears on-screen.
- 6 To save your changes, click **OK**.

---

—End—

---

### To use the Message Waiting Indicator

Here are some helpful tips for using the Message Waiting Indicator:

- To display your mailbox number, the address of the server, and the number of messages waiting in your inbox, position the pointer over the icon.
- Right-click the icon to display a shortcut menu with options to:
  - open My CallPilot (if a URL for My CallPilot is defined in the configuration settings for the Message Waiting Indicator)
  - configure the Message Waiting Indicator
  - log on to or off from your CallPilot mailbox
  - exit from the Message Waiting Indicator so it no longer appears
- To open your latest CallPilot message in My CallPilot, double-click the Message Waiting Indicator icon.

**Note:** If this does not work, ensure that the My CallPilot URL box contains the correct URL in the CallPilot MWI Configuration dialog box. To open the dialog box, right-click the Message Waiting Indicator icon, and then click CallPilot MWI Configuration.

### Changing your mailbox settings

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

## To view or change your mailbox settings

| Step | Action |
|------|--------|
|------|--------|

- |   |                                                                                                                                                                                                     |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | In your Lotus Notes inbox, on the <b>Actions</b> menu, click <b>CallPilot Desktop Messaging &gt; Configuration</b> . Alternatively, in the CallPilot Player, click <b>View &gt; Configuration</b> . |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

The General tab displays your current access settings.

- |   |                                                |
|---|------------------------------------------------|
| 2 | After you make your changes, click <b>OK</b> . |
|---|------------------------------------------------|

—End—

## To change your CallPilot password

Your CallPilot password is the same password that you use on the telephone.

| Step | Action |
|------|--------|
|------|--------|

- |   |                                                                                  |
|---|----------------------------------------------------------------------------------|
| 1 | Repeat step 1 in the previous procedure, and then click <b>Change Password</b> . |
|---|----------------------------------------------------------------------------------|



- 2 In the **Old password** box, type your current password.
- 3 In the **New password** box, type your new password.
- 4 In the **Retype new** box, type your new password again.
- 5 Click **OK** to save the change.
- 6 Click **OK** to exit the General settings.

---

—End—

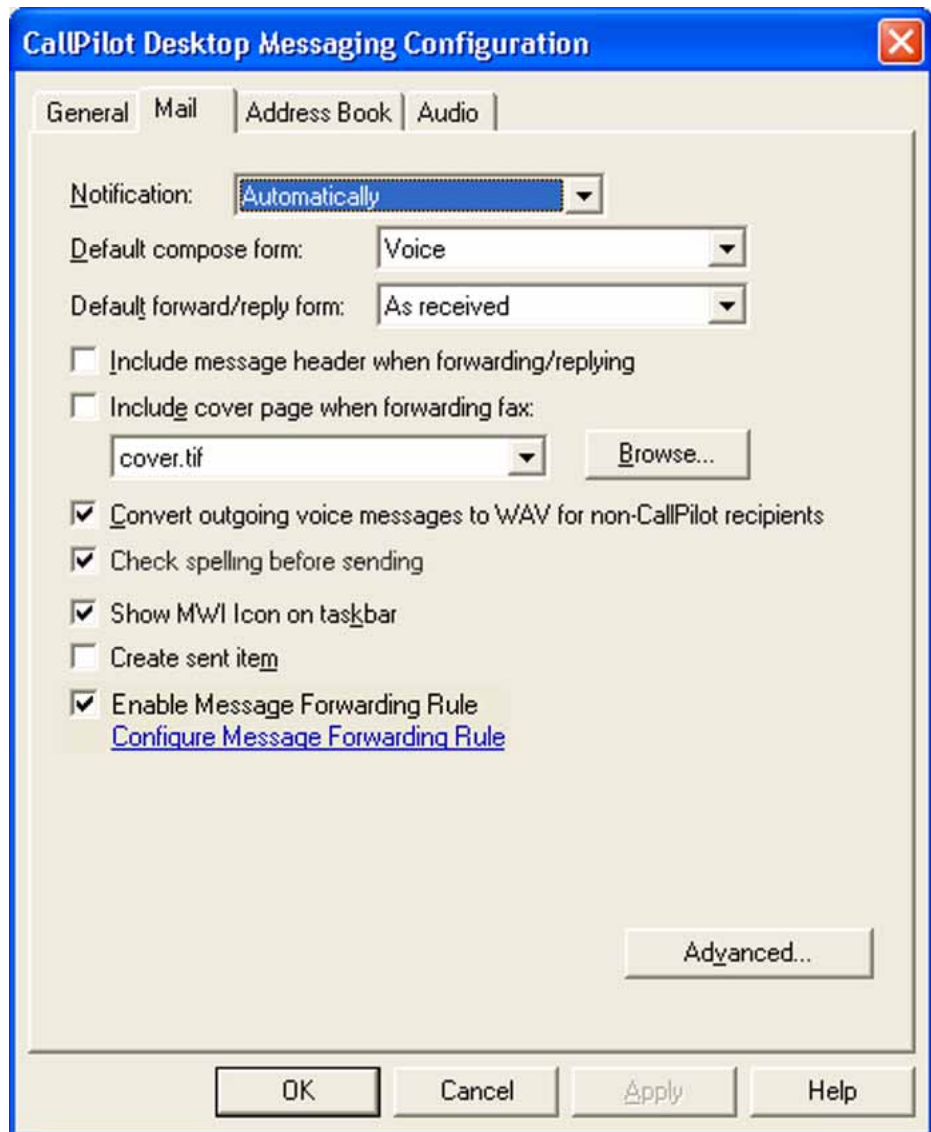
---

## 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. See the online help for a detailed explanation.

| Step | Action                                                                                                               |
|------|----------------------------------------------------------------------------------------------------------------------|
| 1    | In your Lotus Notes inbox, on the <b>Actions</b> menu, click <b>CallPilot Desktop Messaging &gt; Configuration</b> . |
| 2    | Click the <b>Mail</b> 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 message header when forwarding/replying:** This ensures the header information of the original message appears in a reply or forwarded message.
- **Include cover page when forwarding fax:** Select this check box to add a fax cover page.

- **Convert outgoing voice messages to WAV for non-CallPilot recipients:** Your recorded messages are automatically converted from VBK to WAV files when you send them to non-CallPilot users.
- **Check spelling before sending:** Select this check box if you want text messages you create using the CallPilot custom form to be automatically spell-checked when you click Send. If you clear this check box, you can still run the spell checker manually. You must have Microsoft Word installed for the spell checker to work.
- **Show MWI icon on taskbar:** The CallPilot telephone icon on the Windows taskbar turns red when you have a new message and provides you with other helpful information.
- **Create sent item:** Select this option if you want a copy of each sent message stored in the Sent folder.
- **Enable Message Forwarding Rule:** Select this option if you want to enable a message forwarding rule you configured, that is, a rule for forwarding your CallPilot messages to an external e-mail address or a CallPilot inbox. If this check box appears dimmed, the CallPilot administrator has not granted you privileges to do this.

**Note:** If you have access to My CallPilot, you can create, edit and delete your own message forwarding rule. For more information, see the *Desktop Messaging User Guide for My CallPilot* (NN44200-109).
- **Configure Message Forwarding Rule:** Click this link to connect directly to the My CallPilot application and configure settings for forwarding your CallPilot messages to an external e-mail address or a CallPilot inbox. If this link does not appear, the CallPilot administrator has not granted you privileges to do this.

4 After you make your changes, click **OK**.

---

—End—

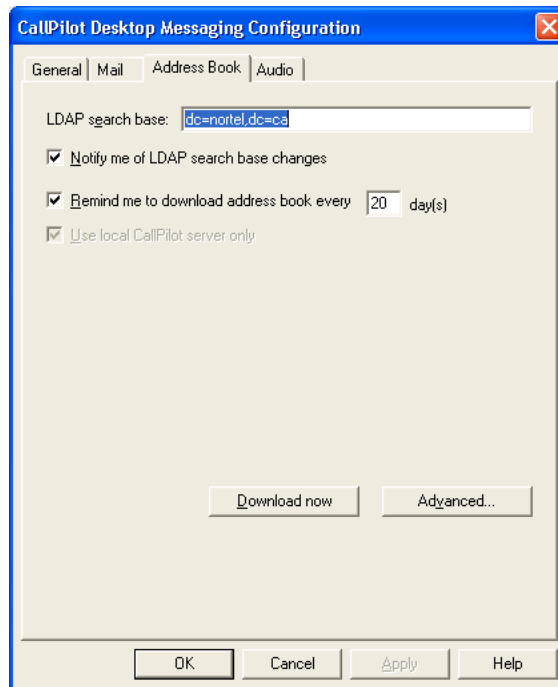
---

## Changing your Address Book settings

Your administrator enters the default Address Book settings for you. You can change the Address Book settings, if required. See the online help for a detailed explanation of the settings.

## To view or change your Address Book settings

- | Step | Action                                                                                                                                                                       |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | In your Lotus Notes inbox, on the <b>Actions</b> menu, click <b>CallPilot Desktop Messaging &gt; Configuration</b> .                                                         |
| 2    | Click the <b>Address Book</b> tab to display the current Address Book settings.                                                                                              |
| 3    | After you make your changes, click <b>OK</b> , or proceed to download your Address Book as described below. For information about the options displayed, click <b>Help</b> . |



—End—

## To download the Address Book to your computer

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

- | Step | Action                                                                                                   |
|------|----------------------------------------------------------------------------------------------------------|
| 1    | In your inbox, on the <b>Actions</b> menu, click <b>CallPilot Desktop Messaging &gt; Configuration</b> . |

- 2 Click the **Address Book** tab.
- 3 Check the **Remind me** check box and set the number of days between reminders.
- 4 Click **Download Now**.
- 5 Click **OK**.

---

—End—

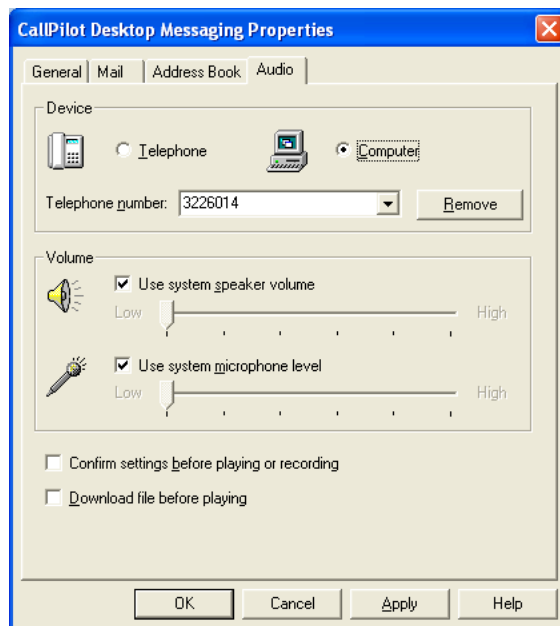
---

## Changing audio settings

### To change the audio device and volume

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

- | Step | Action                                                                                                                                                                                                         |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | In your CallPilot Desktop Messaging inbox, on the <b>Actions</b> menu, click <b>CallPilot Desktop Messaging &gt; Configuration</b> .<br>Or<br>In the CallPilot Player, select <b>View &gt; Configuration</b> . |
| 2    | Click the <b>Audio</b> tab to display the current audio settings.                                                                                                                                              |





- 3 In the Device section, 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 the Volume section, 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.

---

—End—

---

## Linking to My CallPilot

Desktop Messaging provides links to the Web-based resources in My CallPilot. You can link to either the home page or the Greetings page. To view or change the URL for My CallPilot, see ["Changing your mailbox settings" \(page 50\)](#). For more information about My CallPilot, see the *Desktop Messaging User Guide for My CallPilot* (NN44200-109).

---

| Step | Action |
|------|--------|
|------|--------|

---

- |   |                                                                                                                                                                             |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | In your e-mail inbox, on the <b>Actions</b> menu, click <b>CallPilot Desktop Messaging &gt; My CallPilot</b> , and then click either <b>Home Page</b> or <b>Greetings</b> . |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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

---

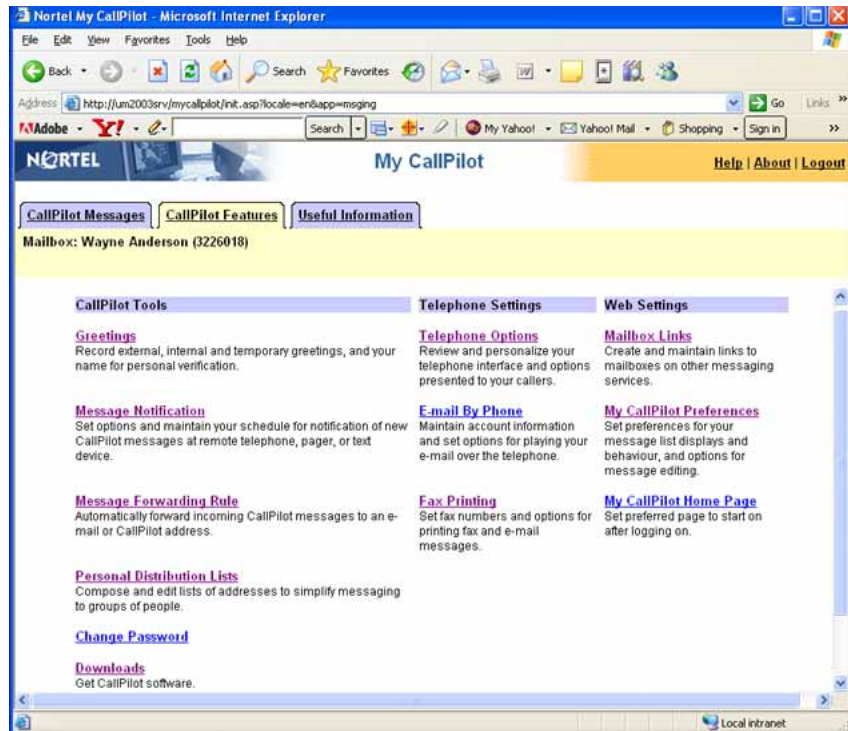
—End—

---

## To view or change your CallPilot feature settings

| Step | Action |
|------|--------|
|------|--------|

- |   |                                                           |
|---|-----------------------------------------------------------|
| 1 | In My CallPilot, click the <b>CallPilot Features</b> 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. |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

—End—

## To view user information

In My CallPilot, click the **Useful Information** tab to view online user information specific to your mailbox.

CallPilot Messages

CallPilot Features

Useful Information

**Your Mailbox Status**

1. Your mailbox can store approximately **15** minutes of audio.
2. Voice messages are deleted **7** days after listening to them.
3. Read faxes are deleted after **7** 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 **5** minutes.
8. Your password was last changed **thursday 02 november 2006 at 13:24:57**.
9. Last logon to this mailbox was **friday 22 december 2006 at 01:33:32**.
10. Number of failed logon attempts **0**.

**CallPilot Access Numbers**

- |                                |                 |
|--------------------------------|-----------------|
| 1. Voice Messaging:            | 4300            |
| 2. Express Voice Messaging:    | n/a             |
| 3. Speech Activated Messaging: | n/a             |
| 4. Name Dialing:               | (Not Available) |
| 5. Default Fax Number:         | n/a             |
| 6. Fax Messaging:              | n/a             |
| 7. Express Fax Messaging:      | n/a             |
| 8. Dial Prefix:                | 9               |
| 9. Area Code:                  | 506             |
| 10. Exchange:                  | n/a             |
| 11. ESN Access Code:           | 6               |
| 12. ESN Exchange:              | (Not Available) |

**Need More Help?**

No CallPilot support information has been defined.

**CallPilot User Documentation**

[PDF User Guides and Reference Cards](#)

## Working offline

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.

| Step | Action |
|------|--------|
|------|--------|

- |   |                                                                                                                                                                                                                                                                                   |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 <b>Actions</b> menu, click <b>CallPilot Desktop Messaging &gt; Download all Messages</b> . When your messages are downloaded, log off. |
| 2 | (Optional) You can download the server address book to your computer. See " <a href="#">Changing your Address Book settings</a> " (page 54).                                                                                                                                      |

- 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**.

---

—End—

---

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.



Nortel CallPilot

## Desktop Messaging User Guide for Lotus Notes

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