

CommPilot Call Manager Quick Reference

User's Name and Number → Ed Smith
5551234567

Enter Phone Number → Enter Phone Number

CommPilot Express Profile in Use → Profile: None

Call Control Buttons → Talk, Hold, Conference, Hang Up

Tabs or Phone List Links → GROUP | PERSONAL | CALL LOG | OUTLOOK | LDAP | PREFERENCES

Initiate a Call

- 1) Select a phone list. Click **Tab** to display list.
- NOTE:** To create a phone list, refer to section *Phone List* (p. 3)
- 2) Select a phone number. Click **phone number** to populate **Enter Phone Number** text box.
 - 3) Click **Dial** button or press **Enter**.
 - 4) For initial calls, the phone rings, and then rings the called party after the telephone handset is lifted. When making a second call, clicking the **Dial** button automatically holds the existing call.

NOTE: Phone numbers can be entered directly from the keyboard into the **Enter Phone Number** box, or can be dialed on the telephone.

Answer a Second Call

For second calls only, telephone handset must be picked up on an initial call.

- 1) In **Call Control Area**, click to select call to answer.
- 2) Click **Talk** button (existing call held automatically).

End a Call

- 1) In **Call Control Area**, click to select call to be released.
- 2) Click **Hang Up** button.

NOTE: If all calls have been released, telephone handset must be replaced before initiating next call.

Place a Call on Hold

- 1) In **Call Control Area**, click to select call to hold.
- 2) Click **Hold** button.

Remove a Call from Hold

- 1) In **Call Control Area**, click to select call to remove from hold.
- 2) Click **Talk** button.

Redial a Call

- 1) Click **Redial**.
- 2) If there are no other active calls, the phone rings, and then rings the called party after the telephone handset is lifted. The **Enter Phone Number** box does not populate with the number.

Activate Do Not Disturb, Call Forwarding Always, or Remote Office

Click the text link (service abbreviation) to access the service configuration page.

Three-Way Conference Call

With the Three-Way Call service assigned:

- 1) Answer or initiate first call.
- 2) Answer or initiate second call. This action automatically holds first call.
- 3) Click **Conference** button.
- 4) All calls are connected.

NOTE 1: To release one party of conference call, select call in **Call Control Area** and click **Hang Up**.

To mute the call, click **Conference** then **Hold**.

NOTE 2: While engaged in an active conference call, click **Transfer**. The two calls remain connected and the users are disconnected.

System Buttons

Support

Open a new e-mail message to report a problem to customer support.

Help

Get page-specific instructions; button is on every page.

Configure

Access your service customization pages.

Blind Transfer a Call

With the Call Transfer service assigned:

- 1) In **Call Control Area**, click to select the call to be transferred.
- 2) Select phone number using **Tabs** or enter on keyboard.
- 3) Selected number displays in **Enter Phone Number** box.
- 4) Click **Transfer** button.

Transfer with Consultation

With the Call Transfer service assigned:

- 1) In **Call Control Area**, click to select the call to be transferred.
- 2) Click **Hold**.
- 3) Select phone number using **Tabs** or enter on keyboard.
- 4) Selected number displays in **Enter Phone Number** box.
- 5) Click **Dial** button.
- 6) Speak with active call.
- 7) Click **Transfer** button (with no number specified in the **Enter Phone Number** box).
- 8) Two existing calls are connected.

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Send a Call to Voice Mail

- 1) While the phone is ringing and the call is displayed, click the call to send to voice mail in the Call Control Area
- 2) To send to your own voice mailbox, click **SEND TO VM**.
- 3) To send to the voice mailbox of another user, enter the extension in **Enter Phone Number** box and click **SEND TO VM**.

CommPilot Express

Manage your incoming calls according to CommPilot Express profiles. Enter your profile information on the *Outgoing Calls - CommPilot Express* service configuration web page. Click the drop-down arrow on the CommPilot Call Manager to select your current status.

The screenshot displays the configuration interface for CommPilot Express profiles. It is divided into three main sections: Available - In the Office, Busy, and Unavailable. Each section contains options for how calls should be handled when the user is in that status. The 'Available - In the Office' section includes options for ringing additional phones and having Voice Messaging take the call. The 'Busy' section includes options for sending all calls to Voice Messaging, forwarding calls from selected phone numbers, and receiving email notifications. The 'Unavailable' section includes options for sending all calls to Voice Messaging and having Voice Messaging take the call using either 'No Answer Greeting' or 'Unavailable Greeting'. The interface uses checkboxes, radio buttons, and text input fields to configure these settings.

Available - In the Office

Indicate how you want calls handled when you are in the office. Choices include ringing additional phones when your phone rings, and what to do if your phone is busy or if you don't answer.

Available - Out of the Office

Indicate how you want calls handled when you are available to receive calls, but out of the office. You can forward all calls to your current location, or have Voice Messaging answer the call. You can also have a text message sent, indicating when a call is received.

Busy

Indicate how you want calls handled when you are busy. You can forward calls from selected numbers, send all calls to Voice Messaging, and have a text message sent, indicating when a call is received.

Unavailable

Indicate how you want calls handled when you are not available, such as when you are on vacation. You can forward calls from selected numbers, and specify a Voice Messaging greeting to be heard by all callers.

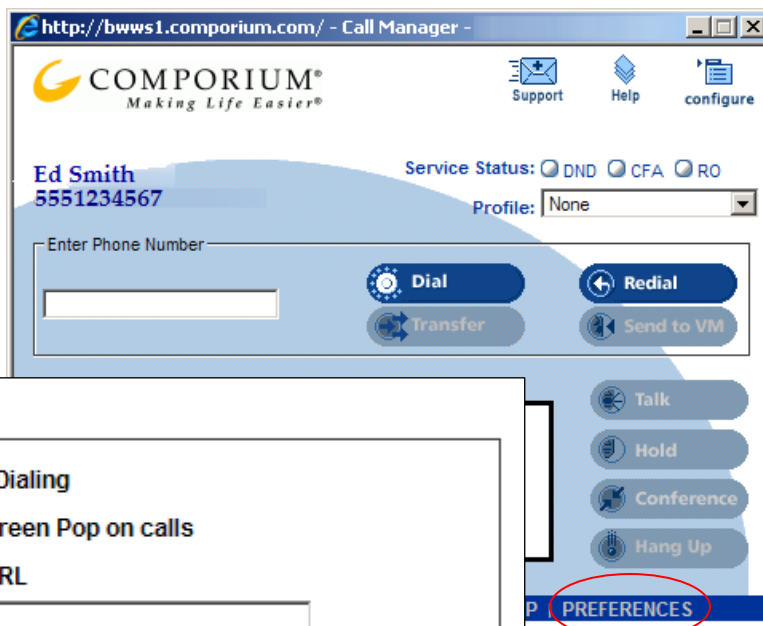
None

If you select this option, none of your profiles are in use. Any other services you may have activated are used to handle incoming calls.

NOTE 1: Precede a forwarded phone number with a Feature Access Code to initiate that service.

NOTE 2: You should not configure other services, such as Call Notify, Call Forwarding, or Simultaneous Ring if you use CommPilot Express.

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From the CommPilot Express service configuration page, specify how calls will be handled in varying circumstances (above) and then select the CommPilot Express profile from the Call Manager (left).

Preferences

General

- Use One-Click Dialing
- Enable Web Screen Pop on calls

Web Screen Pop URL

Phone Lists

- Click the link (phone list name) at the bottom of window to expose phone list; click again to close.
- Click phone number to populate **Enter Phone Number** text box.

NOTE: If One-Click Dialing is enabled on the *Preferences* page, the call will process when clicked.

GROUP is configured by the group administrator and accessible as a dial list from the CommPilot Call Manager tab, at left. Use the **SUMMARY** and **DETAIL** buttons to open new browser windows with complete phone lists for printing (*only appears if you are a member of a Group*).

ENTERPRISE is configured by the group administrator and accessible as a dial list from the CommPilot Call Manager tab, at left. Use the **SUMMARY** and **DETAIL** buttons to open new browser windows with complete phone lists for printing (*only appears if you are a member of an Enterprise*).

PERSONAL is created and edited by users. The list allows users to create their own list of frequently called numbers. Text files of names and phone numbers can be loaded to the Personal Phone List using the import feature. To add phone numbers to your Personal Phone List, go to Outgoing Calls – Personal service configuration Web page.

PREFERENCES allows you to:

- Use one-click dialing from phone lists to the Call Manager (requires a Network Server configured to dial without a “1” for long-distance calls).
- Enable a specified web page (such as the front end of a customer database) to appear for incoming and outgoing calls.
- Open Microsoft Journal entries when placing calls, receiving calls, or both.
- Specify the default location for Outlook Contacts.

CALL LOG displays information on received, placed, and missed calls.

OUTLOOK (See the following page for Outlook Integration details.)

LDAP is a list of contacts from your LDAP directory. Enter search criteria in text box to search for individual contacts.

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The screenshot shows the CommPilot Call Manager interface. At the top, it displays the user's name 'Howey, Brad' and service status options (DND, CFA, RO). Below this is a profile dropdown set to 'Available: In Office'. A central area contains a 'Dial' button and a 'Redial' button, along with a 'Transfer' button and a 'Send to VM' button. A large empty box is intended for a v-card. To the right of this box are buttons for 'Talk', 'Hold', 'Conference', and 'Hang Up'. Below these are navigation tabs: 'GROUP | PERSONAL | CALL LOG | OUTLOOK | LDAP | PREFERENCES'. The 'OUTLOOK' tab is active, showing 'Outlook Contacts'. A folder dropdown is set to 'Mailbox - Brad Howey - Contacts'. A search criteria dropdown is set to 'Name', and a search text box is empty. Below the search box is a table of contacts.

Name/Company	Business	Home	Mobile
Amelia Anderson Comporium Communications	803-555-1212	-	803-555-1234
Bill Beaty Comporium Communications	803-123-4567	-	704-555-1212

Annotations with arrows point to the following elements:

- Edit the phone number**: Points to the 'Enter Phone Number' text box.
- Click card icon for v-card; position for mouse-over text of name and company**: Points to the large empty box.
- Folder to search for contacts**: Points to the folder dropdown menu.
- Search criteria text box**: Points to the search criteria dropdown menu.
- Click name for v-card**: Points to the name in the contact list.
- Phone list links**: Points to the navigation tabs.
- Click number to populate "Enter Phone Number" text box**: Points to the phone number in the contact list.

Outlook Integration

- Click **Tab** to expose Outlook Contacts; click again to close.
- Click phone number to populate **Enter Phone Number** text box.
- Click name in list or **Card Icon** in **Call Control Area** to show v-card of contact. Called or calling parties with v-card have **Card Icon** to left of name in **Call Control Area**.
- Click **REFRESH** to expose newly entered contacts.
- Use scroll bar to view up to 25 contacts. Contacts not displayed must be searched for, or use the **FIRST PAGE**, **PREVIOUS**, **NEXT**, and **LAST PAGE** buttons.

NOTE: Upon initial use of **Outlook Contacts** list, click **Yes** in *security warning* dialog box to install and run component permitting access to Outlook Contacts.

Search

- 1) Select **Outlook Folder** to search.
- 2) Select search criteria in drop-down menu.
- 3) Enter search criteria in text box.
- 4) Click **SEARCH**.

Up to 25 contacts meeting criteria appear. To reduce this further, search again with more specific criteria, or use paging buttons to view additional search results.

Contacts newly entered in Microsoft Outlook appear when **REFRESH** is clicked.

NOTE: If the CommPilot Call Manager is started before Outlook, Microsoft will prompt you to verify your settings. Click **OK** to continue. To avoid this dialog box, open Outlook before starting the CommPilot Call Manager.