

BCM CallPilot Desktop Messaging for Microsoft Exchange / Outlook

CallPilot Message Store

The CallPilot Message Store contains your received, sent, and deleted CallPilot messages.

When you delete a message from your Inbox, it moves to the Deleted Items folder. To delete messages permanently from your CallPilot mailbox, empty your Deleted Items folder.

You can move or copy a message to a new folder. Keep the new folder inside your CallPilot Message Store if you want to access messages from the telephone.

To open a message, double-click the message line.

To create a new message, click the New CallPilot Message icon.

New messages appear in bold.

Date and time received.

Subject shows sender's phone number, and if the message is voice, fax, or text. Voice messages show duration; fax messages show ID and page count.

Delivery report shows that your message was received.

Read receipt shows that your message was opened by the recipient.

Exclamation mark shows that this message is urgent.

Paperclip icon shows that this message has an attached file.

From	Subject	Received	Size
John Smith (7400)	0-11 Voice Message	02/20/00 3:23	2K
Diane Horton (7413)	Fax ID: 1028; Text Message	02/20/00 3:09 PM	—
Diane Horton (7413)	Fax ID: 1028; 2 p Fax Message	02/20/00 3:06 PM	179K
John Smith (7400)	0-03 Fw: (7364) 0-03 Voice M.	02/20/00 1:10 PM	19K
John Smith (7400)	0-06 Fw: (7366) 0-03 Voice M.	02/20/00 1:09 PM	19K
John Smith (7400)	Read receipt	02/20/00 1:07 PM	2K
Postmaster (System)	Fax ID: 1023; Delivery report	02/20/00 12:43 PM	1K
John Smith (7400)	0-17 Voice Message	02/20/00 12:21 AM	2K

When you open Microsoft Exchange or Microsoft Outlook, your CallPilot messages appear in the Inbox under **CallPilot Message Store**.

From the Inbox, you can open, move, copy, delete, forward, and reply to messages, and compose new messages.

The CallPilot indicator in the Windows system tray turns red when you have a new message.

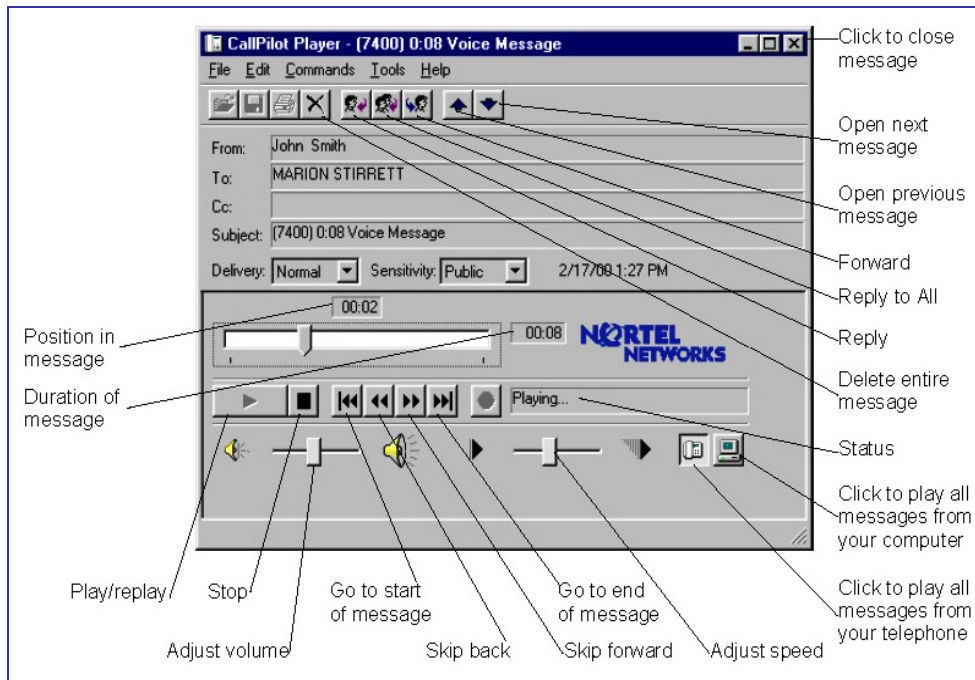
Change your password

You may change your password from your desktop or from your telephone.

- 1 On the Tools menu in your Inbox, click **Services**
- 2 Click the **Services** tab and select **CallPilot Desktop Messaging**
- 3 Click **Properties** then click the **General** tab
- 4 Click on **Change Password** and complete the password change
- 5 Click **OK** to complete

Access Messages

Play a voice message



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

You can choose to play your voice messages from your telephone or your computer by clicking the Telephone or Computer icon in the bottom right hand corner of the CallPilot Player. This selection may be changed at any time. When Telephone is selected, your phone rings when you open a message, and the message plays when you answer. When Computer is selected, your messages play through your computer's speakers or your headphones.

Address messages

To download the CallPilot Address Book

The CallPilot Address Book contains the names and addresses of all users on your local CallPilot server and must be downloaded to your computer in order to use it. Note that you cannot edit this list.

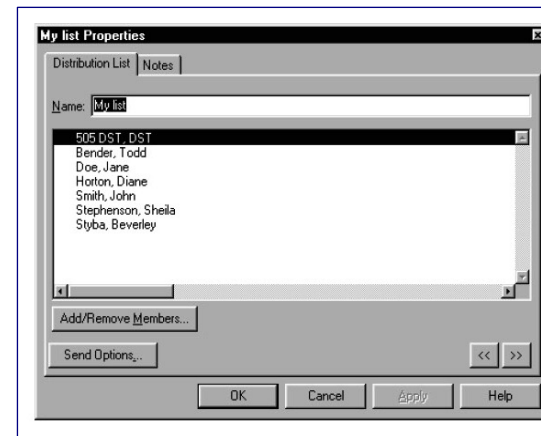
- 1 In your Inbox, on the Tools menu, select Services..., then select CallPilot Desktop Messaging on the Services tab
- 2 Click **Properties**, then click the Address Book tab
- 3 Click **Download now**
- 4 To refresh the list on a regular basis, tick the **Remind me...** box and enter the number of days between reminders.
- 5 Click **OK** to return to your Inbox.

To add CallPilot addresses to your Personal Address Book

- 1 Double-click a name in the CallPilot Address Book
- 2 In **Properties**, click Add to Personal Address Book

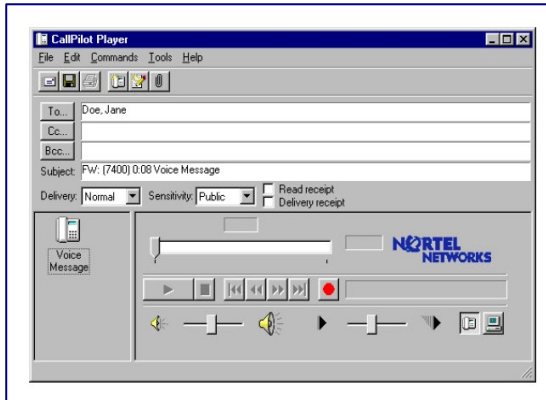
To create a personal distribution list

You can create a personal distribution list for a group of recipients to whom you frequently send messages. After you create a list, it appears in your Personal Address Book. You cannot access these lists from your telephone.



- 1 On the **Tools** menu in your Inbox, click **Address Book**
- 2 Select **Personal Address Book**, and on the File menu, click **New Entry**
- 3 Select **Personal Distribution List**, and click **OK**
- 4 Type a list name in the **Name** box
- 5 Click **Add/Remove Members...** then scroll to CallPilot Address Book and select it
- 6 Select the relevant names, clicking **Members ->** after each name
- 7 Click **OK** to end the list then **OK** again to save the list.

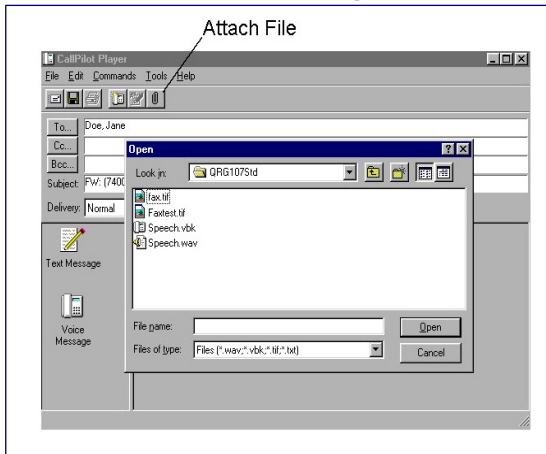
To forward and reply to a message



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

- 1 In an open message, click the Forward, Reply, or Reply to all icon
- 2 Compose your message
- 3 Address a forwarded message the same way as a new message

To attach a file to a message



You may attach a voice, fax, or text file to your messages.

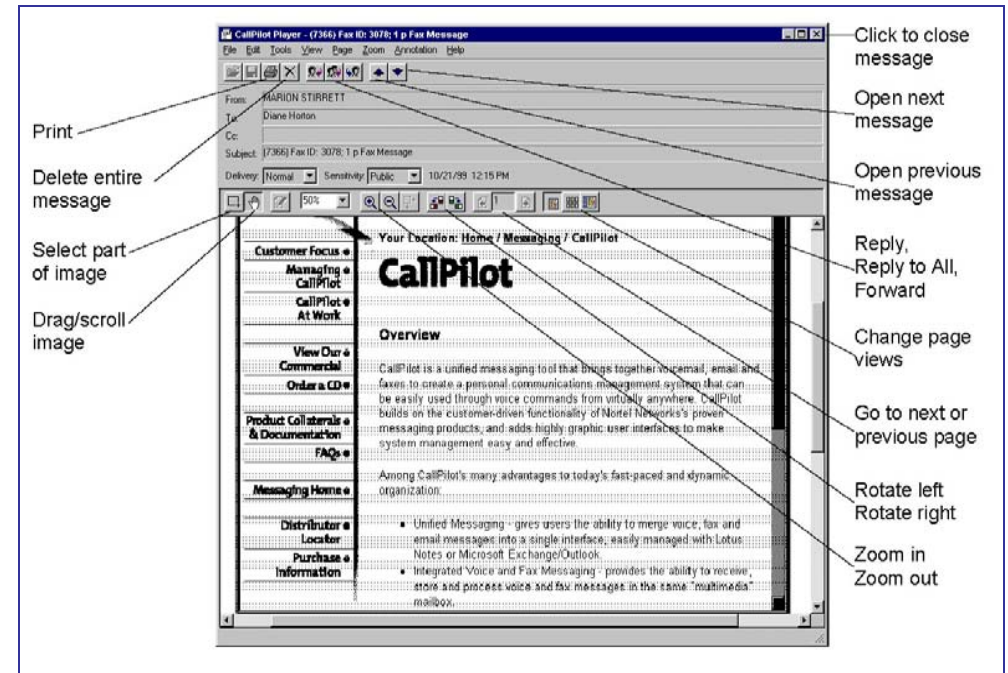
Voice files can be .vbk or .wav format for CallPilot recipients, or .wav format for non-CallPilot recipients.

Fax files must be .tif type f format

Text files must be .txt format

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

View fax messages

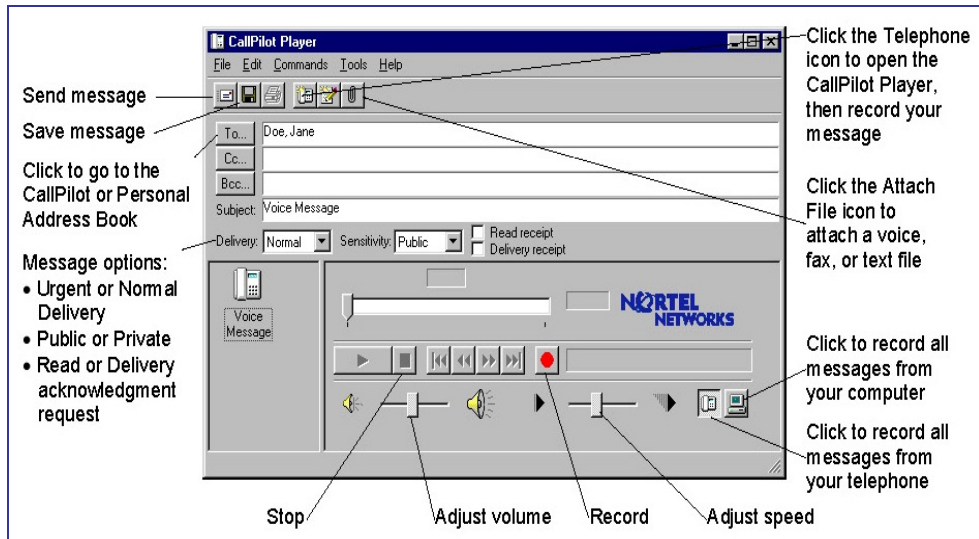


To view faxes, you must have Imaging for Windows installed on your PC. In addition, your System Administrator must enable fax capability for your mailbox.

To open a fax message, double-click the message line. When you open a fax-only message, the fax image appears right away. In mixed voice and fax or text messages, click the Fax icon to view the fax.

While viewing the fax, you can enlarge or reduce the image, rotate it, move it, save it, add a voice annotation to the saved file, forward and reply to it, and print it.

Compose Messages



Composed messages can be any combination of voice, fax, or text and can be a new message, a reply to a received message, or an introduction to a forwarded message. Attachments and options may also be added.

To record and send a voice message

You create a voice message by opening a new CallPilot message and recording a message from your computer or your telephone. You can send the message or save it to send later.

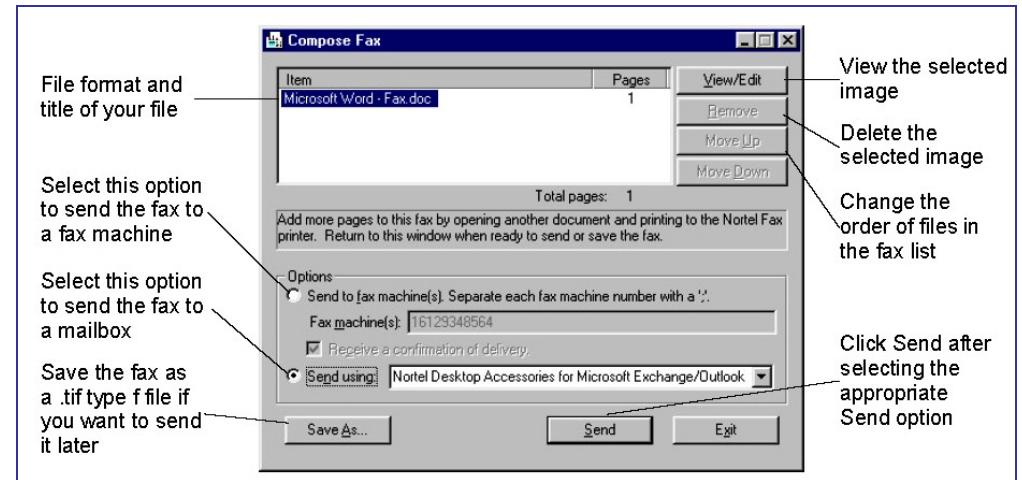
- 1 On the Microsoft Exchange or Outlook toolbar, click the New CallPilot Message icon to open a new message window
- 2 Click the Telephone icon in the toolbar to open the CallPilot Player
- 3 On the CallPilot Player, click the red Record button to start recording
- 4 If you are recording from the computer, record your message into the microphone - click Stop to end the recording. If you are recording from the telephone, answer when it rings. At the tone, record your message then click Stop to end the recording and hang up
- 5 Click on the To... button to open the CallPilot or Personal Address Book, or type in the formatted address
- 6 On the toolbar, click the Send Message icon

To save a newly created voice message as a file

- 1 Record a message then, on the File menu, click **Save as...**
- 2 In the File name box, type a name for the file, select a folder to keep the file in, then click **Save as...**

Save voice files as .vbk files if your recipients are all CallPilot users, or as .wav files if recipients are non-CallPilot users.

Create and send a fax message



To send a fax, your CallPilot mailbox must have fax capability. The recipients of your fax must also have fax capability to view the fax on their computer. If your recipients access their messages from their telephone, they can view the fax only by printing it. Internet Explorer must be your default browser.

- 1 Open the document that you want to fax - ensure that it is 8.5 inches (21.5 cm) wide or less
- 2 On the File menu, click **Print**
- 3 From the list of printers, select Nortel Fax, then click **Print** or **OK**.
- 4 The **Compose Fax** dialog box displays. Before sending the fax, you can add more documents, including a cover page, by repeating steps 1 to 3. You may also view the fax and save it as a file
- 5 Select a Send option
 - a To send your fax to a fax machine, enter the number(s), then click **Send**
 - b To send your fax to a CallPilot or e-mail recipient, select **Send using...** then click **Send**

If you selected **Send using...**, you may add a voice introduction to the fax:

- 1 In the Voice Annotation dialog box, click **Yes**, then record the voice file
- 2 A new message window opens with your fax file attached - click **To...** to open the CallPilot or Personal Address Book, or type the formatted address
- 3 On the toolbar, click the **Send Message** icon