



220 Perry Parkway

Gaithersburg, MD 20877

Tel (301) 977-9440

Fax (301) 977-8846

BROADWORKS COMMPILOT PERSONAL AND CALL MANAGER TRAINING GUIDE

RELEASE 11.1

Version 1

Messaging
800
Service
Creation
.com
enhanced
services



www.broadsoft.com

BroadWorks® Guide

Copyright Notice

Copyright © 2004 BroadSoft, Inc.

All rights reserved.

Any technical documentation that is made available by BroadSoft, Inc. is proprietary and confidential and is considered the copyrighted work of BroadSoft, Inc.

This publication is for distribution under BroadSoft non-disclosure agreement only. No part of this publication may be duplicated without the express written permission of BroadSoft, Inc. 220 Perry Parkway, Gaithersburg, MD 20877.

BroadSoft reserves the right to make changes without prior notice.

Trademarks

BroadSoft® and BroadWorks® are registered trademarks of BroadSoft, Inc.

Microsoft, MSN, Windows, and the Windows logo are registered trademarks of Microsoft Corporation. Other product names mentioned in this manual may be trademarks or registered trademarks of their respective companies and are hereby acknowledged.

This document is printed in the United States of America.

Table of Contents

1	Course Overview	5
1.1	Purpose of the Course	5
1.2	Objectives.....	5
1.3	Agenda.....	5
1.4	What Happens in This Course.....	5
1.5	Additional Resources.....	6
2	Introduction	7
2.1	What is BroadWorks?.....	7
2.2	What is CommPilot?	8
3	Services	9
3.1	CommPilot Personal Services	9
3.1.1	Profile.....	9
3.1.2	Incoming Calls.....	9
3.1.3	Outgoing Calls	9
3.1.4	Call Control.....	10
3.1.5	Messaging.....	10
3.1.6	Utilities	11
3.1.7	Service Scripts	11
3.1.8	Conferencing.....	11
3.1.9	CommPilot Call Manager Services.....	11
4	Scenarios and Exercises.....	12
4.1	Scenario 1: Set Up Basic Services	12
4.1.1	Example of a Basic Services Setup.....	12
4.2	Exercise 1: Set Up Basic Services	12
4.2.1	Log in.....	13
4.2.2	Update Personal Profile.....	14
4.2.3	Change Password	15
4.2.4	Call Forwarding Always.....	15
4.2.5	Personal Phone List	16
4.2.6	Phone List – Personal Import.....	16
4.2.7	Voice Management.....	17
4.2.8	Voice Messaging Greetings	18
4.3	Scenario 2: Configure Enhanced Services	19
4.3.1	Example of Anonymous Call Rejection	19
4.3.2	Example of Call Notify	19
4.3.3	Example of Selective Call Acceptance/Selective Call Rejection.....	19
4.3.4	Example of Selective Call Forwarding.....	19
4.3.5	Example of Simultaneous Ring.....	19
4.4	Exercise 2: Configure Enhanced Services.....	20

4.4.1	Anonymous Call Rejection	20
4.4.2	Call Notify	20
4.4.3	Selective Call Acceptance and Selective Call Rejection	21
4.4.4	Call Forwarding Selective.....	22
4.4.5	Simultaneous Ring.....	23
4.5	Scenario 3: Use CommPilot Call Manager	24
4.5.1	Example of Three-Way Conference Calling.....	24
4.5.2	Example of Transfer with Consultation.....	24
4.6	Exercise 3: Use CommPilot Call Manager.....	24
4.6.1	Initiate a Call.....	24
4.6.2	Three-Way Conference Calling	25
4.6.3	Transfer with Consultation.....	25
4.6.4	Outlook Integration	25

1 Course Overview

1.1 Purpose of the Course

The purpose of this course is to familiarize you with CommPilot terminology and the system functionality. We will review the steps to set up and manage phone services from the CommPilot Personal portal. We will also review call management with the CommPilot Call Manager.

This guide is used in conjunction with the course presentation slides *BroadWorks CommPilot Personal and CommPilot Call Manager Training*.

1.2 Objectives

After completing this course, you will be able to:

- Discuss the benefits of using a web interface to set up and manage phone services.
- Set up and manage basic services.
- Set up enhanced services and features.
- Use CommPilot Call Manager to make and control phone calls.

1.3 Agenda

Topic	Length
Course Overview	5 minutes
Introduction	5 minutes
Scenarios and Exercises	1 hour
Course Review	20 minutes

1.4 What Happens in This Course

Here's what we'll be doing and what will be expected of you:

- The instructor will explain CommPilot and discuss its benefits.
- The instructor and participants will discuss typical caller scenarios.
- Participants will practice setting up, managing, and using services.
- Participants will discuss group and user scenarios and will practice setting up and managing the system.

1.5 Additional Resources

Online help is always available when using CommPilot. This useful tool provides information such as “how to steps”, detailed field descriptions, and character limits. Online help is accessible throughout the system by clicking the Help link, which can be found in the upper right hand corner of each page.

The *BroadWorks Application Server User Web Interface Administration Guide* contains information for administrative workflow, system and group management, detailed instructions for setting up services, interfaces, and includes page captures.

2 Introduction

2.1 What is BroadWorks?

BroadWorks is an enhanced services delivery system that allows service providers to offer web-enabled communications applications over packet networks. The BroadWorks product family provides support for call routing and translations, media-oriented applications such as Three-Way Conferencing, Voice Messaging, Auto-Attendant and other interactive voice response (IVR) applications, as well as for personal calling functions such as Selective Call Forwarding and Notification, Call Transfer, and integration with Microsoft Outlook for contact retrieval and dialing.

Next-generation networks consist of network elements that provide packet conversion, call control, and applications. BroadWorks is an application focused on local and edge services for businesses. Designed for next-generation networks, BroadWorks is developed on a standards-based, modular architecture utilizing common protocols, open interfaces, and scalable, industry-standard hardware. This open environment enables service providers and third-party service developers to build new applications to be delivered over the broadband infrastructure.

Despite the clear efficiency and benefits of next-generation networks, the current telecommunications market is plagued by staggering customer churn due to the arduous process and expense of serving and servicing customers. There is little competitive differentiation in service offerings, and service providers are forced to compete on price. However, the large soft costs associated with provisioning and servicing new customers reduces the profit and desire to meet the needs of any size company.

BroadWorks provides a high servicing component between the service provider and the customer, with user control and configuration via a standard web portal. By allowing users to augment their basic phone functionality via a web portal, existing services such as conference calling and call forwarding become easier to use, and new services become easier to deploy. For example, if a BroadWorks user wants to selectively forward calls from an office phone to a cell phone, it can be done with a few clicks on a web page or wireless PDA. Previously, with Centrex-like services, such a service would require a highly complex and time-consuming procedure for both the user and the service provider. Web access provides integrated service management and lets end users configure and manage their own services via a familiar interface, significantly lowering the cost of customer service and operations. BroadWorks can be configured individually by a user and a phone line, or by a group manager to inter-work as a key system or PBX.

BroadWorks is servers and services. BroadWorks provides a complete solution via its three server components. The BroadWorks Application Server provides call processing, personal and group services, and service management. The BroadWorks Media Server provides specialized media resources, interactive voice response, and conferencing capabilities. The BroadWorks Network Server provides policy-based call routing and translations. Together, these components provide personal, group, and network services including Centrex-equivalent functions, Voice Messaging, web call management, as well as Hunt Groups, Auto Attendant functions, call routing and translations, and calling restrictions.

2.2 What is CommPilot?

CommPilot refers to the web interface of BroadWorks.

CommPilot Personal grants easy access to service configuration and management to users. Activating and customizing services such as call forwarding and call notification is simple and intuitive.

CommPilot Call Manager allows users to control calls (with call functions such as hold, transfer, and conference), via a familiar web page, rather than complex star codes and flash-hooks. For those users comfortable with star codes and flash-hooks, however, some functions (such as Automatic Recall, Call Park, Call Waiting, and so on) are available.

3 Services

The group (company) administrator sets up individual users (group members). The user manages a web interface, referred to as the CommPilot Personal portal. The portal allows activation, deactivation, and customization of his/her own services; including modifications to speed dial numbers, changes to passwords, and updates to the profile. The services available to users are dependent upon the services purchased by the company or organization.

3.1 CommPilot Personal Services

3.1.1 Profile

- Home - Profile
- Passwords
- Time Schedule

3.1.2 Incoming Calls

- Anonymous Rejection
- Calling Line ID Blocking Override
- Calling Name Retrieval
- Call Forwarding – Always/Busy/No Answer/Selective
- Call Notify
- Do Not Disturb
- External Calling Line ID Delivery
- Incoming Calling Plan
- Internal Calling Line ID Delivery
- Intelligent Network Service Control
- Alternate Numbers
- CommPilot Express
- CommPilot Express SR
- Priority Alert
- Selective Acceptance
- Selective Rejection
- Sequential Ring
- Simultaneous Ring

3.1.3 Outgoing Calls

- Automatic Callback
- Call Return
- Calling Party Category

- Last Number Redial
- Line ID Blocking
- Outgoing Calling Plan
- Speed Dial 8
- Speed Dial 100
- Account Codes
- Outgoing Digit Plan
- Personal Phone List

3.1.4 Call Control

- Call Waiting
- Call Pickup
- Directed Pickup
- Flash Call Hold
- Flash Call Transfer
- Flash Three-Way Call
- Attendant Console
- Client Call Control
- CommPilot Call Manager
- Instant Messaging Presence
- Outlook Integration
- Phone Status Monitoring
- Remote Office
- Shared Call Appearance
- Windows Messenger

3.1.5 Messaging

- Aliases
- Distribution Lists
- Greetings
- Personalized Name
- Voice Management
- Third-Party Message Waiting Indicator (MWI) Control
- Third-Party Voice Mail Support
- Voice Portal Calling

3.1.6 Utilities

- Authentication
- Feature Access Codes
- Group Directory
- Intercept User

3.1.7 Service Scripts

- Configuration
- Load

3.1.8 Conferencing

- Conferences
- Recordings
- Bridges
- Reports

3.1.9 CommPilot Call Manager Services

Using the web-based call manager, CommPilot Call Manager, you can dial and answer calls, hold, retrieve, release, conference, and transfer calls.

The services and functions available are:

- Dial by Phone List: Group, Personal, Call Log, Outlook Contact List, or LDAP directory
- Three-Way Calling
- Call Transfer
- Call Transfer with Consultation
- Call Transfer with Three-Way Consultation
- Call Waiting
- Calling Name/Number Delivery
- Do Not Disturb indicator and service link
- Call Forwarding Always indicator and service link
- Remote Office indicator and service link
- Extension dialing
- Search phone list

4 Scenarios and Exercises

4.1 Scenario 1: Set Up Basic Services

4.1.1 Example of a Basic Services Setup

As a new user to the system, a user usually would like to take advantage of managing their own services such as: updating their profile and password, setting up Call Forwarding, setting up Voice Messaging, and adding to their Personal Phone List.

After logging in, you have access to all the services the company has purchased. Through the CommPilot Personal portal, you can:

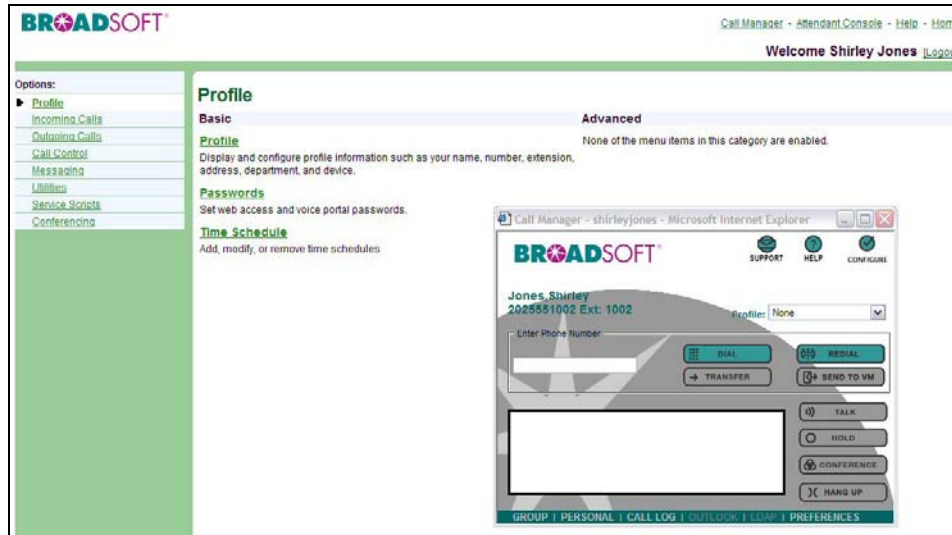
- Modify your profile
- Change your password
- Activate Call Forwarding Always
- Activate Voice Messaging
- Add a phone number to your Personal Phone List

4.2 Exercise 1: Set Up Basic Services

In Scenario 1, we discussed modifying and configuring basic services, including the profile and password, Call Forwarding, Voice Messaging for busy calls, and adding to your Personal Phone List. This exercise reviews the steps necessary to set up basic services.

4.2.1 Log In

- 1) In the **User ID** field, enter your user ID.
- 2) In the **Password** field, enter your password.
- 3) Click **Bookmark this page** and type the name in the Add Favorite dialog box to access this page from your IE menu.
- 4) Click the **Login** button or press the **Enter** key. The **CommPilot Personal** home page and the **CommPilot Call Manager** page display as two separate windows.



4.2.2 Update Personal Profile

Your profile contains your personal information such as name, User ID, phone number, extension, and e-mail address.

Profile

Profile allows you to view and maintain your profile information. The information filled in specifies your primary phone number, extension, and device that are used for handling calls. Filling in the additional information section allows your mobile phone, pager, and other information to be visible to other group members in the group phone list. Some of this information can only be modified by your administrator.

OK
Apply
Cancel

Service Provider ID: AWSTel	Group: ABC Distributing
User ID: cherylbaldwin	
* Last Name: <input type="text" value="Baldwin"/>	* First Name: <input type="text" value="Cheryl"/>
Phone Number: 2025551009	Extension: 1009
* Calling Line ID Last Name: Baldwin	* Calling Line ID First Name: Cheryl
Department: Human Resources	* Language: <input type="text" value="English"/>
* Time Zone: <input type="text" value="(GMT-04:00) US/Eastern"/>	
Aliases: cherylbaldwin@assanity.mtl.broadsoft.com	

Set Up Shared Device

* Shared: spTrunkDev

* LinePort: 2025551009

Additional Information

Title:

Pager: Mobile:

E-mail: YahooID:

Location:

Address:

City: State/Province:

Zip/Postal Code: Country:

OK
Apply
Cancel

- 1) For your convenience, minimize the CommPilot Call Manager.
- 2) From the Options list, click **Profile** and then click **Profile** on the **Profile** menu page.
- 3) Update the profile as desired by typing the **First Name** and **Last Name** in the corresponding text boxes and selecting the appropriate language and time zone.
- 4) Modify the additional information as required.
- 5) Click **OK** or **Apply**.

4.2.3 Change Password

You can change the login password or voice portal password.

- 1) Click **Passwords** on the **Profile** menu page.
- 2) To change the password that allows the user to login to BroadWorks, click **Set web access password**; clicking **Set voice portal password** changes the code that allows the user to change voice-messaging options.
- 3) Type the current password.
- 4) Type the new password. You are required to confirm the new password by typing it a second time.
- 5) Click **OK** or **Apply**.

NOTE: If you forget your password, notify your group or company administrator to have your password reset. Upon your next log in, follow the steps above to change your password.

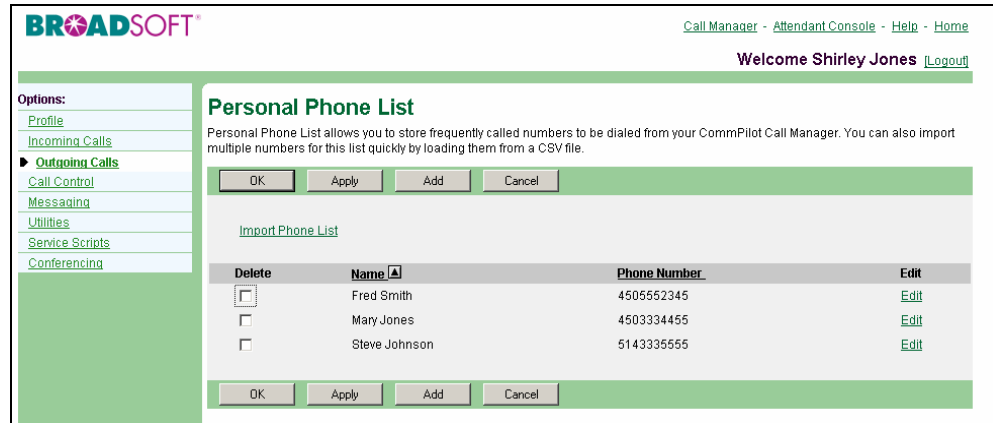
4.2.4 Call Forwarding Always

Call Forwarding Always allows you to redirect your incoming calls to another number.

- 1) Click **Call Forwarding Always** on the **Incoming Calls** menu page.
- 2) Click the **On** radio button. When the Call Forwarding service is turned on, calls will be sent to the number you have designated in the **Calls Forward to** field.
- 3) Enter a phone number to which calls will be forwarded, such as an administrative assistant.
- 4) Click **Play Ring Reminder when a call is forwarded** if required.
- 5) Click **OK** or **Apply**.

4.2.5 Personal Phone List

A Personal Phone List is a speed-dial list from the CommPilot Call Manager. By selecting a name from the drop-down list of speed dial numbers, the CommPilot Call Manager will dial the person's phone number.



- 1) Click **Personal Phone List** on the **Outgoing Calls** menu page.
- 2) Click **Add** on the **Personal Phone List** page. The **Add to Personal Phone List** page displays.
- 3) Type the **Name** and **Number** exactly as you want them to appear in the dialing list. All numbers must be ten digits and long-distance numbers must include a 1.
- 4) Click **OK**.

4.2.6 Phone List – Personal Import

- 1) Click the **Import Phone List** link on the **Personal Phone List** page.
- 2) In the **Select a Phone List File** field, type the file name or click the **Browse** button to locate the .CSV file. Click **Open**.
- 3) Click **OK** or **Apply**.

4.2.7 Voice Management

Voice Management allows you to specify recorded messages for callers when the user's phone is busy and/or when you do not answer.

- 1) Click **Voice Management** on the **Messaging** menu page.
- 2) If you would like to use the Voice Messaging service, click the **On** radio button.
- 3) Click the **Use unified messaging** radio button.
- 4) If you would like a phone message-waiting indicator, click the **Use Phone Message Waiting Indicator** box.
- 5) Click the **Forward it to this e-mail address** box. Specify the e-mail address.
- 6) If you would like to receive an e-mail notification when a caller has left a voice message, click the **Notify me by e-mail of the new message at this address** box and provide the e-mail address.
- 7) If you would like to receive a carbon copy of this message voice message, click the **E-mail a carbon copy of the voice message to** box and provide the e-mail address.
- 8) For callers to transfer to another number, click the **Transfer on 0** box. Enter the Attendant phone number.
- 9) Click **OK** or **Apply**.

4.2.8 Voice Messaging Greetings

- 1) Click **Greetings** on the **Messaging** menu page.
- 2) Under **Busy Greeting**, select **System greeting** (system recording) or **Personal greeting** (your voice recording). If you select Personal greeting, click the **Browse** button to locate the .WAV file on your computer. Recording your personal greeting can also be accomplished by dialing the voice mail retrieval number and following the prompts on the phone.
- 3) Under **No Answer Greeting**, select **System greeting, Unavailable Greeting** or click **Browse** button to locate the Unavailable Greeting as a .WAV file on your computer. Additional greetings can be saved for future use. You may provide up to three Alternate No Answer recordings.
- 4) Click the radio button corresponding to the number of times your phone should ring before voice messaging picks up.
- 5) Click **OK** or **Apply**.

4.3 Scenario 2: Configure Enhanced Services

BroadWorks offers a number of enhanced services. Below is a group of enhanced services that are part of the CommPilot Personal portal. These services are easily accessible and simple to configure.

4.3.1 Example of Anonymous Call Rejection

Telemarketers who have activated their Line ID blocking have hounded an engineer lately. He would like this to stop. He can activate his Anonymous Call Rejection service, and callers who have activated their Line ID blocking will not be able to ring his line, instead they will hear an announcement stating that the called party is not accepting calls from anonymous callers.

4.3.2 Example of Call Notify

The marketing manager is going to be out of town for a week. He has turned on his Voice Messaging service, but needs to know if the Vice President is trying to reach him. He can create a Call Notification to send a text message to his mobile phone alerting him that VP has called his number.

4.3.3 Example of Selective Call Acceptance/Selective Call Rejection

A busy salesman is working on an important presentation for his client and cannot be disturbed by anyone unless it is a customer. He can set up Selective Call Acceptance to only receive calls from those numbers specified; all others will receive an announcement stating that you are not accepting calls at this time.

4.3.4 Example of Selective Call Forwarding

A service technician is going to be on the road all day. She is expecting a call from her boss regarding a possible promotion and does not want to miss the call. She set up her Call Forwarding Selective service to send only the calls from her boss to forward to her mobile phone. All other calls can go to Voice Messaging.

4.3.5 Example of Simultaneous Ring

The VP of Sales is going to be in and out of the office all day, but does not want to miss a call. She wants the calls to be answered in her office while she is there. By activating Simultaneous Ring with her mobile phone and assistant's phone, she can send incoming calls to ring all phones and the first to be answered will receive the call.

4.4 Exercise 2: Configure Enhanced Services

In Scenario 2, we discussed examples of additional enhanced services. To set up these services, follow the steps below.

4.4.1 Anonymous Call Rejection

Anonymous Call Rejection allows you to prevent the receipt of phone calls from numbers that are not identifiable.

- 1) Click **Anonymous Rejection** on the **Incoming Calls** menu page.
- 2) The **Reject Anonymous Caller** defaults to **Off**. If you would like to activate this service, click the **On** radio button. When the service is active, callers who have intentionally blocked their calling line ID will not be able to ring your line; instead they will hear a recording stating that you are not accepting calls from anonymous callers.
- 3) Click **OK** or **Apply**.

4.4.2 Call Notify

Call Notify service allows you to receive an e-mail notification of calls from all or specified numbers, on all or specified days, and at all or specified times.

- 1) Click **Call Notify** on the **Incoming Calls** menu page.
- 2) Enter the e-mail address to which the call notification should be sent.
- 3) Click **OK** or **Apply**.
- 4) Click **Add** to create notification. The **Call Notify Add** page displays.

Call Notify Add

Allows you to add a single-criteria entry for Call Notify. Specify the time schedule you would like an e-mail when the callers call. Also, you can have an e-mail sent when only specified numbers call or all numbers call. If you need more than 12 numbers or more distinct time periods, you can create multiple call notify entries.

OK Cancel

* Description:

* Selected Time Schedule:

Calls from

Any phone number

Specific phone numbers:

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel

- 5) Enter the **Description** (name of notification).
- 6) Select the **Selected Time Schedule**.
- 7) In the **Calls from** field, check **Any phone number** or enter **Specific phone numbers** (such as the VP's number).
- 8) Click **OK**.

Hint: If your mobile phone has text messaging capabilities, you can have the notifications sent to that phone by entering that text messaging address in the e-mail field.

4.4.3 Selective Call Acceptance and Selective Call Rejection

Selective Call Acceptance allows you to accept calls only from numbers of your choice. When a call is received from other phone numbers not included in your Selective Call Acceptance list, the callers will hear an announcement that you are presently not accepting calls from their numbers.

Selective Call Rejection works much like Selective Call Acceptance, except with this service, you select specific numbers to reject, and all other numbers will be able to call your number. When a call is received from a rejected number the caller will hear an announcement that you are presently not accepting calls from their number.

Selective Call Acceptance Add
Allows you to add a selective call acceptance entry. Specify the time schedule you would like calls to be accepted. Also, you can have the call accepted when only the specified numbers call or all numbers call. If you need more than 12 numbers or more distinct time periods, you can create multiple entries to accomplish this.

OK Cancel

* Description:

* Selected Time Schedule:

Calls from

Any phone number

Specific phone numbers:

<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

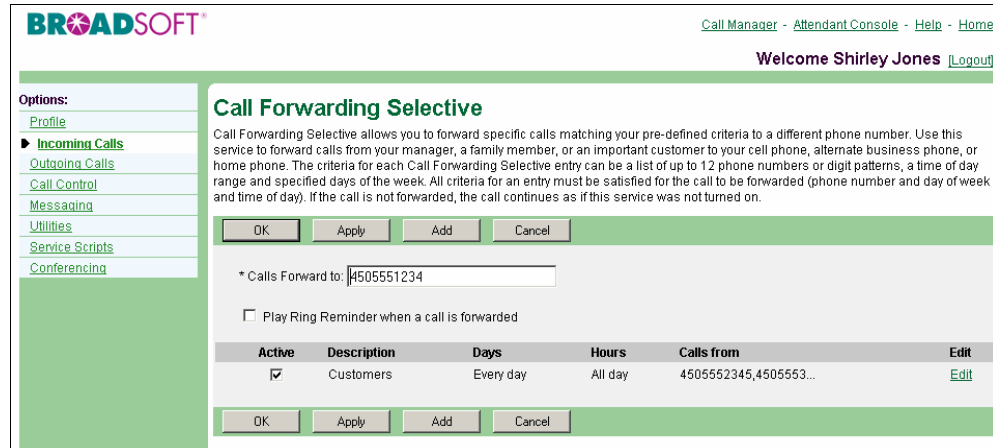
OK Cancel

- 1) Select **Selective Acceptance** on the **Incoming Calls** menu page.
- 2) Click the **Active** box to enable the service. A ✓ indicates the service is active.
- 3) Click **OK** or **Apply**.
- 4) To add numbers, click the **Add** button.
- 5) In the **Description** field, enter a description of the phone numbers.
- 6) Select the **Selected Time Schedule**.
- 7) Check any numbers or enter the phone numbers that trigger Selective Call Acceptance.
- 8) Click **OK**.

For Selective Call Rejection, follow the steps above, except select **Selective Rejection** on the **Incoming Calls** menu page. Remember Selective Call Rejection specifies the numbers for which you will not accept calls.

4.4.4 Call Forwarding Selective

Selective Call Forwarding allows you to forward calls from specified phone numbers to another phone of your choice, such as your mobile phone, administrative assistant, or home phone.



- 1) Click **Call Forwarding Selective** on the **Incoming Calls** menu page.
- 2) Type the number to which calls should be forwarded.
- 3) Click **OK** or **Apply**. Click **Add** to add numbers to be forwarded.
- 4) In the **Description** field, enter a description of the phone numbers.
- 5) Select the **Selected Time Schedule**.
- 6) Enter the **Specific numbers** or leave the **Any number** default setting, which will trigger Call Forwarding Selective.
- 7) Click **OK**.

4.4.5 Simultaneous Ring

Simultaneous Ring allows you to have incoming calls ring at your extension and up to 10 other phone numbers at the same time. The calls will ring at any of the phone numbers in your listing for this service as long as the lines are not busy. The person who picks up the call first answers the call.

BROADSOFT® Call Manager - Attendant Console - Help - Home

Welcome Shirley Jones [Logout](#)

Options:

- Profile
- Incoming Calls**
- Outgoing Calls
- Call Control
- Messaging
- Utilities
- Service Scripts
- Conferencing

Simultaneous Ring

Simultaneous Ring allows you to list numbers you would like to ring in addition to your business phone when you receive a call. This feature is helpful when you not at your desk but you would like your cell phone to ring when you get a call. You can also turn off simultaneous ringing when you are at your desk on a call. Warning... if your cell phone or other phone has voice mail that picks up before your office voice messaging picks up, your voice mails could be on your cell phone messaging system!

OK Apply Cancel

Simultaneous Ring: On Off

How to handle incoming calls:

Don't ring my Simultaneous Ring Numbers if I'm already on a call

Ring all my Simultaneous Ring Numbers for all incoming calls

Sim Ring Phone List

Phone Number: Add

Delete	Phone Number
<input type="checkbox"/>	4505551234
<input type="checkbox"/>	4505552345
<input type="checkbox"/>	5143335566

Delete

- 1) Click **Simultaneous Ring** on the **Incoming Calls** menu page.
- 2) Click the **On** radio button to activate the service.
- 3) Select how you want to handle incoming calls.
- 4) Enter the **Phone Number** to be added.
- 5) Click **Add**. Repeat steps 3 and 4 for each number.
- 6) Click **OK** or **Apply**.

4.5 Scenario 3: Use CommPilot Call Manager

With the CommPilot Call Manager, you can initiate, answer, hold, transfer, and conference calls with the click of a few buttons. The CommPilot Call Manager provides calling information such as call status, caller ID, speed dial phone lists, and Do Not Disturb Call Forwarding Always, and Remote Office indicators. Below are examples of how you could use the CommPilot Call Manager.

4.5.1 Example of Three-Way Conference Calling

You have called a co-worker regarding a client. Your co-worker suggests conferencing in the client. You no longer have to remember flash codes or complex procedures. Simply enter the second number you would like to dial and click Conference. Without any extra steps, all calls are connected.

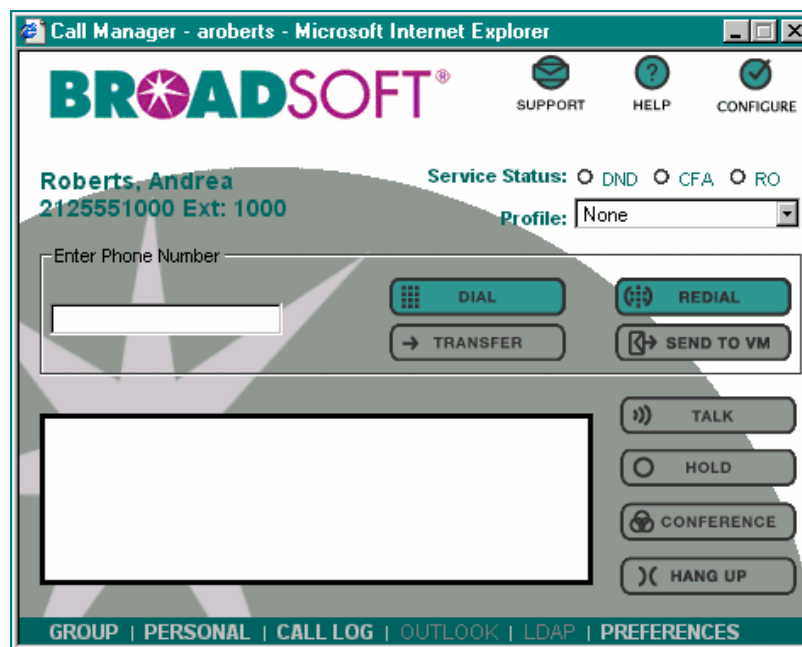
4.5.2 Example of Transfer with Consultation

As an administrative assistant, you receive a call from a client, who would like to speak with your boss. You can dial your boss's number by selecting it from your group phone list, speak with each other, and then transfer the client to your boss's line by clicking the Transfer button. Again, there are no flash codes or complex procedures to remember.

4.6 Exercise 3: Use CommPilot Call Manager

Earlier, we discussed Three-Way Conference Calling and Transfer with Consultation. You can do this from the CommPilot Call Manager by following the steps below.

4.6.1 Initiate a Call



- 1) Select a phone number list, and click a name on the list. The selected name/number display in the **Phone Number** box. You can also enter the number directly in the phone number box.
- 2) Click the **Dial** button.
- 3) For calls you initiate, your phone will ring signaling you to pickup the receiver. Once you lift the receiver, the party you are calling will be rung. When making a second call, clicking the **Dial** button will automatically hold the existing call.

4.6.2 Three-Way Conference Calling

A Three-Way Conference call allows you to make a call with two other parties, where all parties can communicate.

- 1) Initiate the second call in the same fashion as the first (see *Initiate a Call* for instructions).
- 2) While the first call is held, (either by clicking the **Hold** button, or automatically when you initiated the second call) and the second call picks up (call control display now reads "Talking"), click the **Conference** button.
- 3) All calls are connected.

4.6.3 Transfer with Consultation

Place the first call on hold. While the call is held, from the CommPilot Call Manager, select your boss's number from the Group Phone List. Wait for the boss to pickup, speak, and then click the **Transfer** button. The two calls will be connected and will then disappear from your CommPilot Call Manager.

- 1) Place the caller on hold by clicking the **Hold** button or initiate the second call by choosing a number from a phone list or enter the number directly into the phone number box. When the second call is initiated, the first call is automatically put on hold.
- 2) Click the **Dial** button.
- 3) Consult with new active caller.
- 4) Click the **Transfer** button. The two existing calls are connected to each other, and will disappear from your CommPilot Call Manager.

4.6.4 Outlook Integration

Outlook Integration allows you to integrate your contact list in Microsoft Outlook with your CommPilot Call Manager.

- 1) Click the **Outlook Contacts** tab.
- 2) To call a party on the list, click on the number (appears in phone number box). Click the **Dial** button.