



**InterCall Unified Communications
User Manual**

Draft 1.0.0.12

Outlook Integration edition

Draft 1.0.0.12

InterCall UC Account Phone Number

The first time you call your phone number, a chime sounds followed by:

Welcome. To use this dialer, just say your contact's first and last name, such as: 'Bridget Aaronson' or 'Cornelia Wright'. I may have office or cell phone listings, so you can also say: 'Hector Sanchez, cellular', or 'Victor Chen, office.' If you want to call someone not listed, say or enter their 10 digit phone number. To repeat this prompt, say 'help'. Now, whom would you like to call?

After that, each time you call the phone number, a chime sounds followed by the following:

Whom would you like to call? Say a contact name or a ten-digit number.

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InterCall Outlook Integration

InterCall Unified Communications adds vital tools that increase business productivity. InterCall UC supplements your phone and other services with enhanced calling features such as presence, speech dialing, Outlook integration and contact management.

This section highlights the features of the InterCall Outlook Integration.

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FEATURES OF INTERCALL OUTLOOK INTEGRATION

Several features have been added to Outlook as a result of InterCall integration. In this section, we will introduce you to those features. Details about the features will be available subsequent sections.

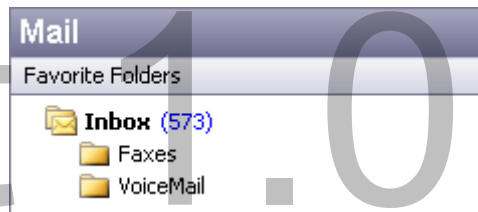
InterCall UC Toolbar

The InterCall UC Toolbar has been added to Outlook.



Outlook Inbox

The Outlook Inbox now has two additional folders. These folders are named Faxes and VoiceMail. They contain your incoming faxes and incoming voicemail messages.



Outlook Contact Directory

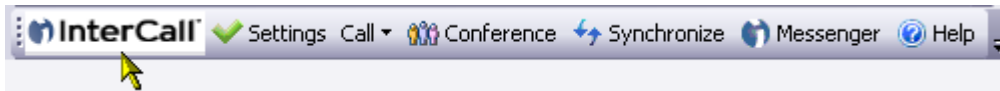
The Contacts tab of Outlook has added folders to help you to organize your contacts.



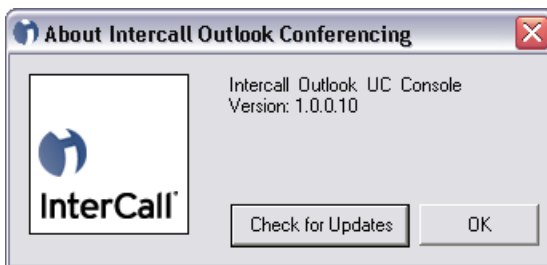
SOFTWARE VERSION NUMBER

There is an easy way to check the version number of your software.

1. To display the version number of your software, *click* the InterCall button on the InterCall Outlook UC Toolbar.



2. A window opens displaying your version number as well as the ability to check for updates.



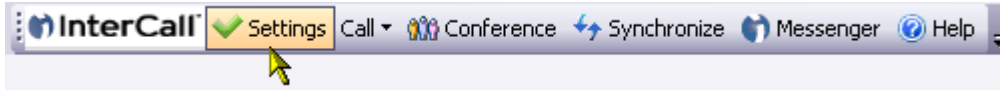
3. *Click* the OK button to exit.

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FIND ME / FOLLOW ME

The Settings button on the InterCall UC Toolbar is used to set your Find Me / Follow Me phone number.

1. On the InterCall Outlook UC Toolbar, *click* the Settings button.



2. The InterCall Conferencing Settings window opens on the Find Me / Follow Me tab. You have a choice as to the phone number where you wish to be reached.

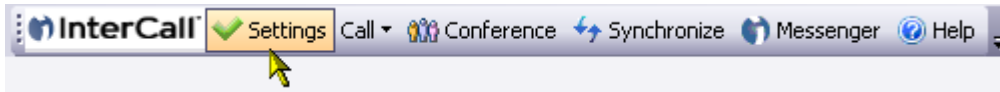


3. If you *click* the checkbox next to Softphone, then the system will use your Softphone to initiate calls.
4. If you *click* the checkbox next to Phone, then in the callback number field becomes available. Type in the phone number where you wish to be reached. Use only digits, no dashes, in the phone number.
5. If you select both, then the system will call your Softphone first. After 3 rings, the system would call the designated phone. Both phones will then ring until you pick up the call or it goes to voice mail.
6. If you do not check either checkbox, then the system will call your Softphone.
7. *Click* the OK button. Your Find Me / Follow Me phone number has been saved.
8. The next time you initiate a call to a contact, the system will use the settings saved on this tab to call you. After connecting with you, the system will call your contact.

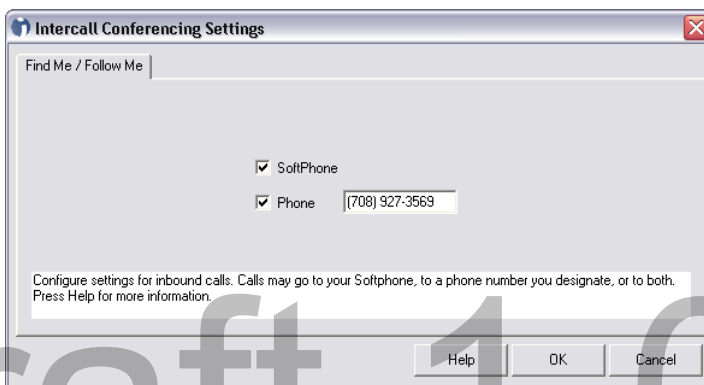
Change the Find Me / Follow Me Phone Number

When you call a contact, the system uses the setting that was last saved on the Find Me / Follow Me tab.

1. On the InterCall Outlook UC Toolbar, *click* the Settings button.



2. The InterCall Conferencing Settings window opens on the Find Me / Follow Me tab. The current setting is displayed. You may make changes to this window as needed.



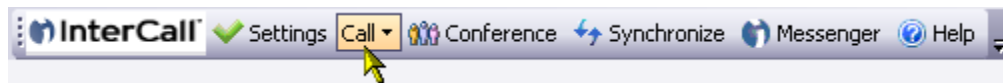
3. If you *click* the checkbox next to Softphone, then the system will use your Softphone to initiate calls.
4. If you *click* the checkbox next to Phone, then in the callback number field becomes available. Type in the phone number where you wish to be reached. Use only digits, no dashes, in the phone number.
5. If you select both, then the system will call your Softphone first. After 3 rings, the system would call the designated phone. Both phones will then ring until you pick up the call or it goes to voice mail.
6. If you do not check either checkbox, then the system will call your Softphone.
7. *Click* the OK button. Your Find Me / Follow Me phone number has been saved.
8. The next time you initiate a call to a contact, the system will use the settings saved on this tab to call you. After connecting with you, the system will call your contact.

CALL FEATURE

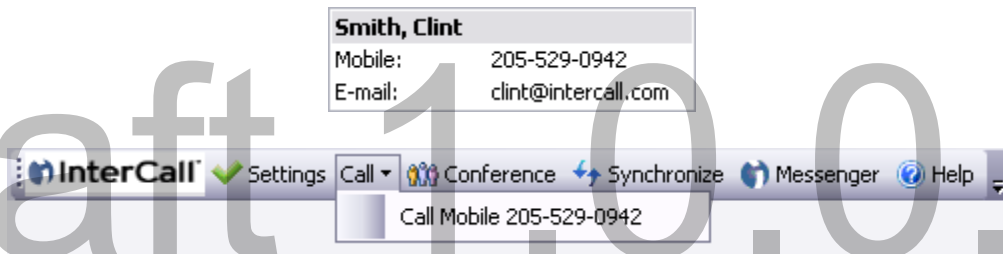
The Call feature is only available on the Outlook Contacts tab.

Using the Call Feature with the InterCall UC Toolbar

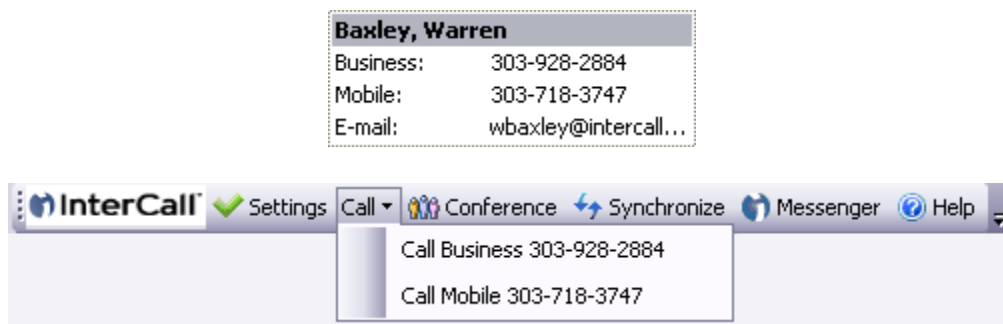
One of the ways to initiate a call is to use the Call button on the InterCall UC Toolbar. However, clicking the Call button on the InterCall UC Toolbar does not call your contact. Clicking the Call button activates a drop down list that displays the available phone numbers of your contact. A call is initiated after selecting a phone number from the drop down list.



If your contact has only one phone number, then only one phone number will display in the Call button drop down list.

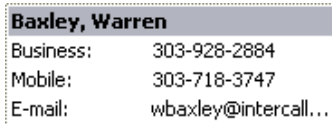


If your contact has multiple phone numbers, then each phone number will display in the Call button drop down list.

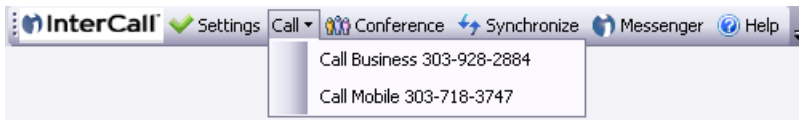


Initiate a Call from the InterCall UC Toolbar

1. Select a contact from your Contacts directory.



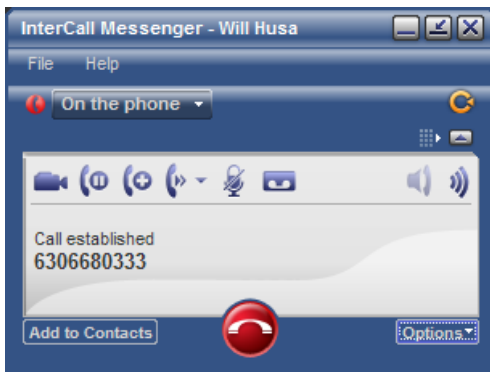
2. From the InterCall UC Toolbar, *click* the Call button. A drop down list displays all the phone numbers available for this contact.
3. Select a phone number from the list.



4. If you have set up a Find Me / Follow Me phone number, then the system calls that phone number first. After connecting with you, the system calls your contact.



5. However, if you have not set up a Find Me / Follow Me phone number, then the system opens the InterCall Messenger to use your Softphone to initiate the call.
6. If your InterCall Messenger is not setup for automatic login, then the Messenger Login window opens. Enter your login information and *click* the Sign In button.
7. The InterCall Messenger window opens.
8. The system calls your contact from the Messenger window. After your contact has answered the phone, then you and your contact are connected in the call.



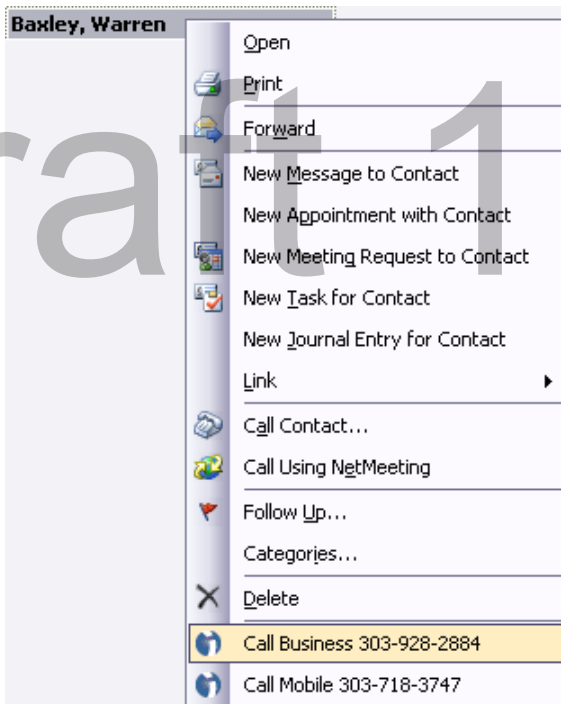
Using the Call Feature with the Right Mouse Button

The Call feature is only available on the Outlook Contacts tab. One of the ways to initiate a call is to highlight a contact from the Contacts Directory and *right-click* on it. This activates a drop down list that displays the available phone numbers of your contact. A call is initiated after selecting a phone number from the drop down list.

1. Select a contact from your Contacts directory.

Baxley, Warren	
Business:	303-928-2884
Mobile:	303-718-3747
E-mail:	wbaxley@intercall...

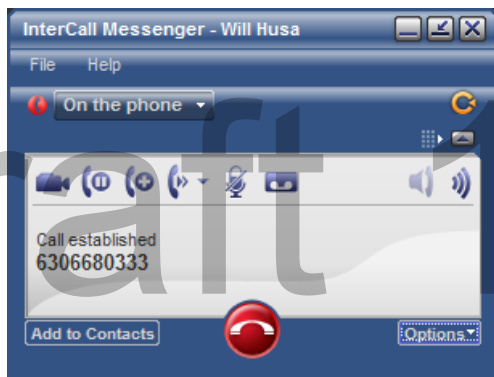
2. Use the mouse button to *right-click* on the contact's name. The contact's phone number will display in a drop down list. If your contact has multiple phone numbers, then each phone number will display in the drop down list.
3. *Click* on a phone number from the list.



4. If you have set up a Find Me / Follow Me phone number, then the system calls that phone number first. After connecting with you, the system calls your contact.



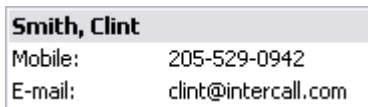
5. However, if you have not set up a Find Me / Follow Me phone number, then the system opens the InterCall Messenger to use your Softphone to initiate the call.
6. If your InterCall Messenger is not setup for automatic login, then the Messenger Login window opens. Enter your login information and *click* the Sign In button.
7. The InterCall Messenger window opens.
8. The system calls your contact from the Messenger window. After your contact has answered the phone, then you and your contact are connected in the call.



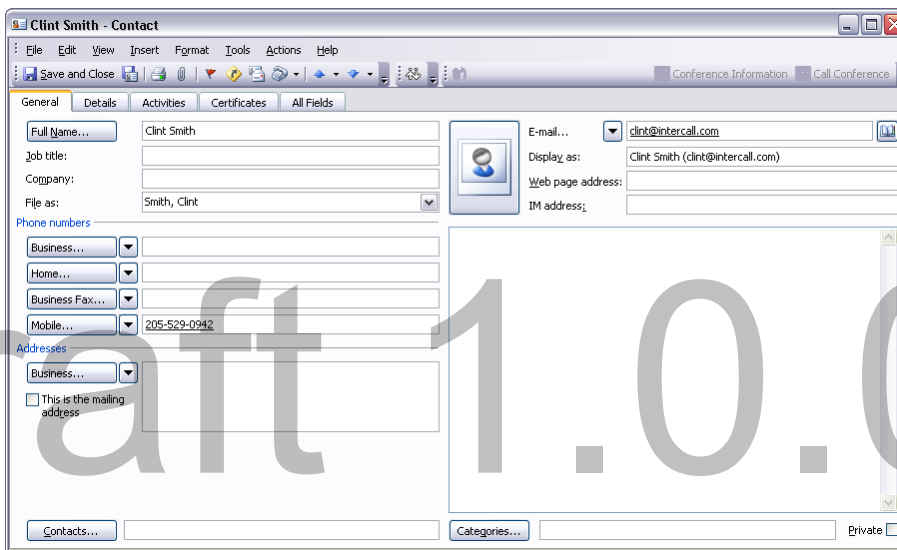
Using the Call Feature with a Contact Listing

The Call feature is only available on the Outlook Contacts tab. One of the ways to initiate a call is to use the contact's detail window from the Contacts Directory.

1. Select a contact from your Contacts directory.



2. Double-click on the name of the person. A contacts detail window opens.



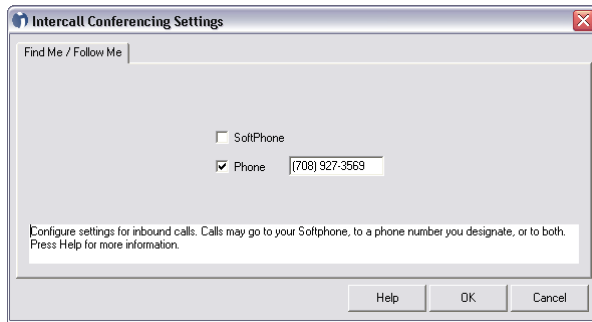
3. Locate the Call Button.



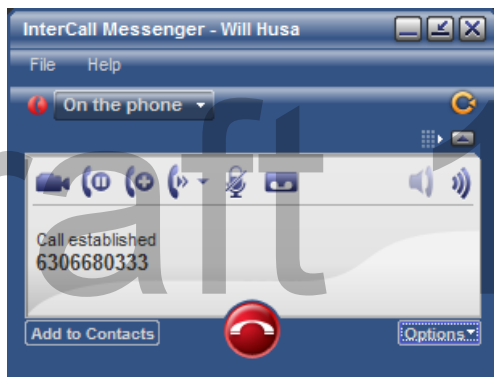
4. Use the mouse button to *right-click* on the Call button. The contact's phone number will display in a drop down list. If your contact has multiple phone numbers, then each phone number will display in the drop down list.



5. Click on a phone number from the list.
6. If you have set up a Find Me / Follow Me phone number, then the system calls that phone number first. After connecting with you, the system calls your contact.



7. However, if you have not set up a Find Me / Follow Me phone number, then the system opens the InterCall Messenger to use your Softphone to initiate the call.
8. If your InterCall Messenger is not setup for automatic login, then the Messenger Login window opens. Enter your login information and *click* the Sign In button.
9. The InterCall Messenger window opens.
10. The system calls your contact from the Messenger window. After your contact has answered the phone, then you and your contact are connected in the call.



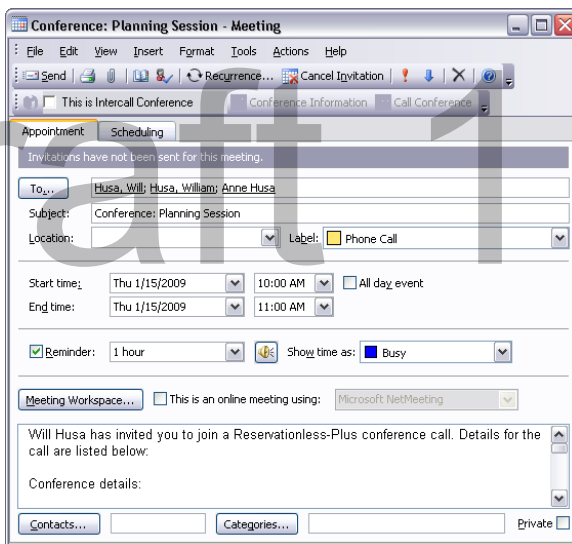
CONFERENCE CALL

You have the ability to schedule a conference call and invite contacts that you have in Outlook. This feature works effectively if your contact uses Outlook. If your contact does not use Outlook, then details about the conference may not be properly displayed in the message area of their e-mail.

1. In Outlook, *click* the Calendar tab. The Calendar opens.
2. Today's date is highlighted.
3. Select a day on the Calendar that you would like to schedule the conference call.
4. On the InterCall UC Toolbar, *click* the Conference button.



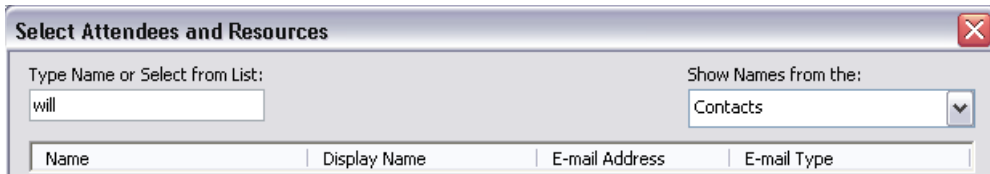
5. The Conference Meeting window opens. The formatting in the Conference Meeting window is the same as Outlook except that the message area has been filled in for you. The gray bar on the Appointment tab indicates the current status of the conference call.



Invite Contacts

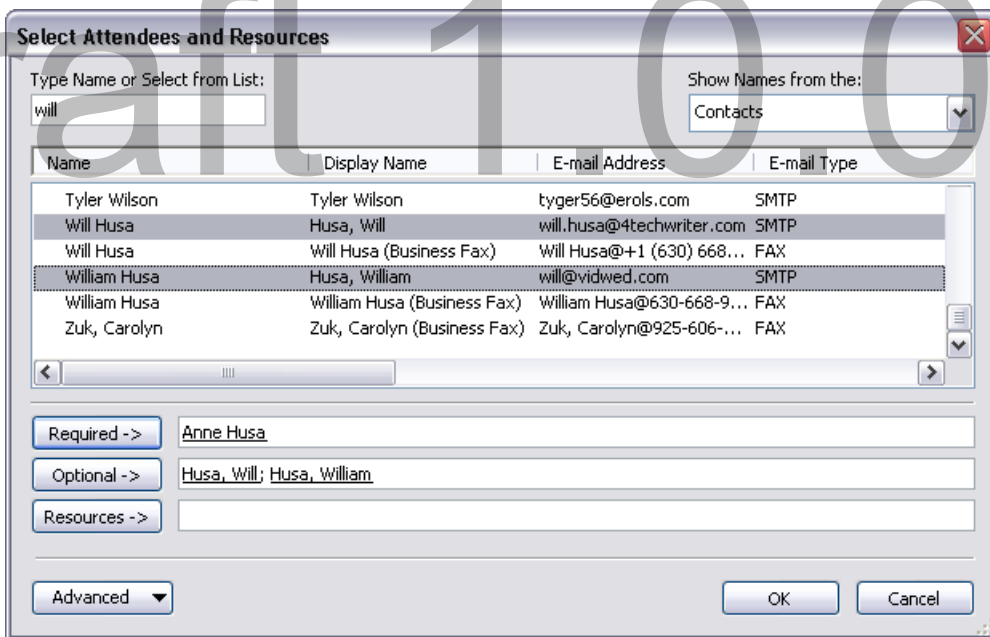
Begin the process by selecting contacts that you wish to invite to the conference call.

1. On the Appointment tab, *click* on the To button.
2. The Select Attendees and Resources window opens.



Name	Display Name	E-mail Address	E-mail Type
Tyler Wilson	Tyler Wilson	tyger56@erols.com	SMTP
Will Husa	Husa, Will	will.husa@4techwriter.com	SMTP
Will Husa	Will Husa (Business Fax)	Will Husa@+1 (630) 668...	FAX
William Husa	Husa, William	will@vidwed.com	SMTP
William Husa	William Husa (Business Fax)	William Husa@630-668-9...	FAX
Zuk, Carolyn	Zuk, Carolyn (Business Fax)	Zuk, Carolyn@925-606-...	FAX

3. Locate the contacts that you wish to invite to the conference call. Select the contact by highlighting the name.
4. You have the option to select the participation level for the contact. Choose between required, optional, or resources. Resources are generally used to assign meeting spaces (per office policy).
 - If the contact needs to attend the meeting, then *click* the Required button. If the contact's participation is not required, but should attend, then *click* the Optional button.
 - To add multiple contacts at once, hold down the CONTROL key and *click* on each contact. Then *click* the Required or Optional button as needed.



Name	Display Name	E-mail Address	E-mail Type
Tyler Wilson	Tyler Wilson	tyger56@erols.com	SMTP
Will Husa	Husa, Will	will.husa@4techwriter.com	SMTP
Will Husa	Will Husa (Business Fax)	Will Husa@+1 (630) 668...	FAX
William Husa	Husa, William	will@vidwed.com	SMTP
William Husa	William Husa (Business Fax)	William Husa@630-668-9...	FAX
Zuk, Carolyn	Zuk, Carolyn (Business Fax)	Zuk, Carolyn@925-606-...	FAX

Required -> Anne Husa

Optional -> Husa, Will; Husa, William

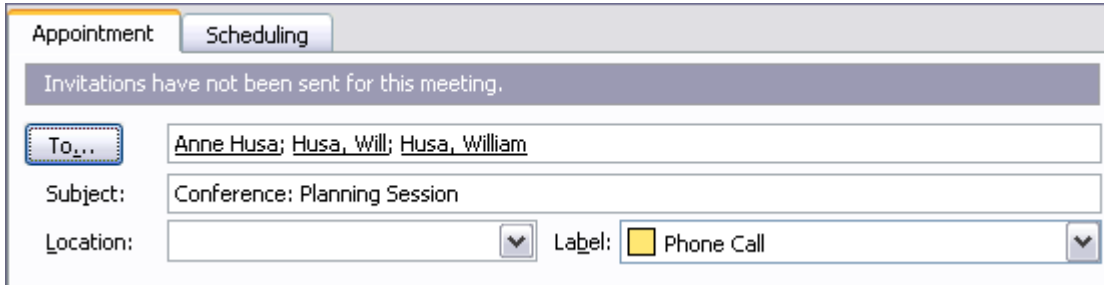
Resources ->

Advanced

OK Cancel

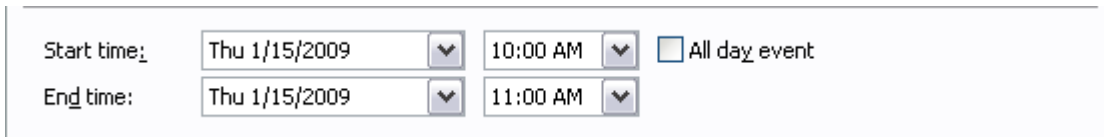
5. When finished selecting your contacts, *click* the OK button at the bottom of the window.
6. You are returned to the Conference Meeting window.
7. The selected contacts are added to the To field on the Conference Meeting window.
8. In the Subject field, enter key information about the conference call. This field will be the first piece of information that your intended contact will see when they review their e-mail.
9. The Location field is optional.

10. If you wish to attach a Label to this conference call, then *click* the down arrow in the Label field. From the drop down list, select phone call. This label will only be saved to your meeting details.
11. The contact information areas are complete.



The screenshot shows the 'Appointment Scheduling' tab. A message at the top states 'Invitations have not been sent for this meeting.' Below this, the 'To...' field contains 'Anne Husa; Husa, Will; Husa, William'. The 'Subject' field is 'Conference: Planning Session'. The 'Location' field is empty with a dropdown arrow. The 'Label' field is set to 'Phone Call' with a yellow square icon and a dropdown arrow.

12. Review the date, start and end times. Make corrections as needed.



The screenshot shows the time and date selection fields. The 'Start time' is set to 'Thu 1/15/2009' at '10:00 AM'. The 'End time' is set to 'Thu 1/15/2009' at '11:00 AM'. There is an 'All day event' checkbox which is currently unchecked.

13. If you wish to set a reminder, then *click* the down arrow in the Reminder field. From the drop down list, select the appropriate time interval.



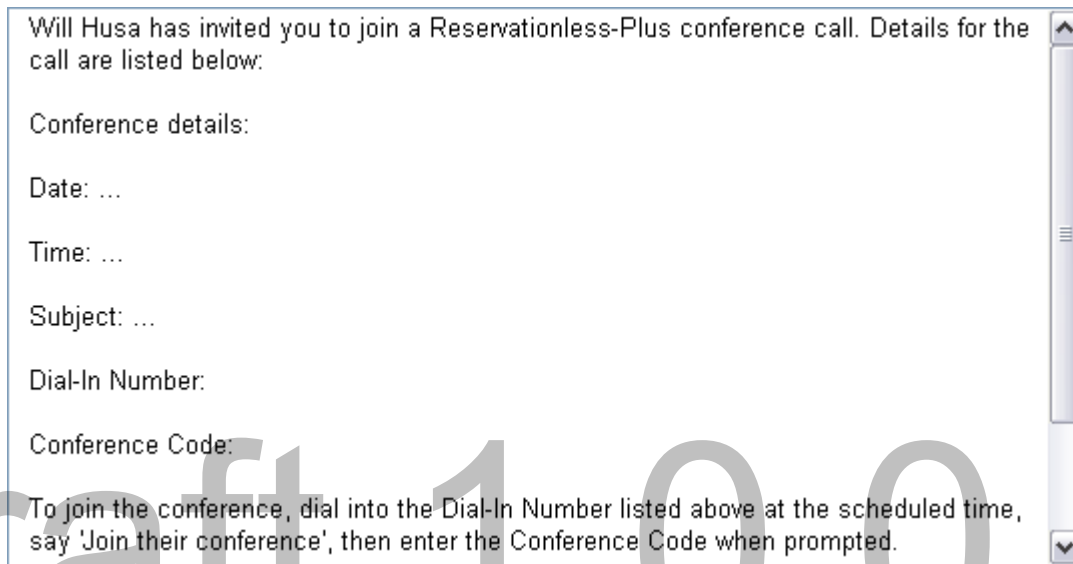
The screenshot shows the reminder and show time as fields. The 'Reminder' field is checked and set to '1 hour'. The 'Show time as' field is set to 'Busy' with a blue square icon.

14. The default is to show the time allotted for the meeting as Busy. If you wish to change that setting, then *click* the down arrow in the Show time as field. From the drop down list, select the appropriate selection.

Message Area

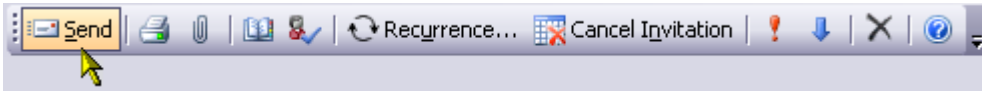
Since this is an InterCall related activity, the Message area has already been filled in with information about the conference call. The system will fill in the details for you. Instructions concerning how to join the conference call are displayed near the bottom of the e-mail.

No changes are required in the Message area. However, if you have additional comments about the conference call that you wish to convey to your audience, then enter them at the bottom of the e-mail.

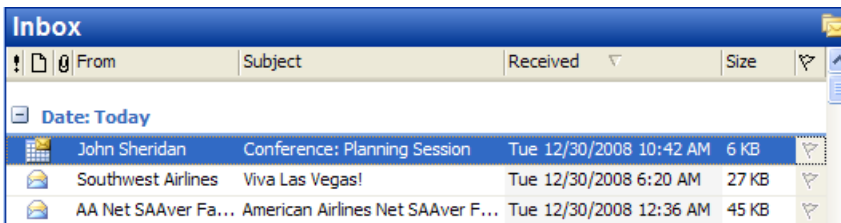


Send the Invitation

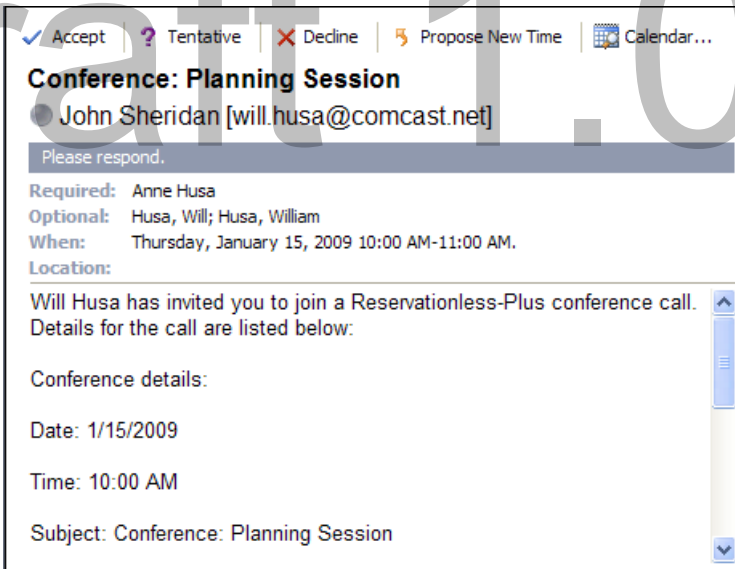
1. Review the invitation.
2. When finished, *click* the Send button.



3. The event has been added to your Outlook Calendar.
4. Meanwhile, your contact receives the invitation in their Outlook e-mail Inbox.



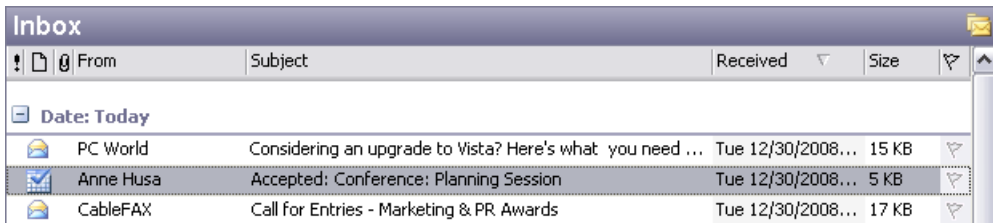
5. When your contact reviews the message, details about the conference call have been filled in by your system. The gray bar on the invitation requests an action to be taken by your contact. In this case, the system is requesting a response to the invitation.



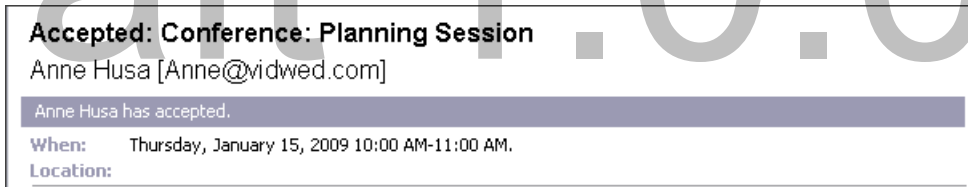
6. Your contact should select one of the following options for your invitation: Accept, Tentatively accept, Decline, Propose New Time or review their calendar. Let's assume that your contact clicks the Accept button.
7. A pop-up window asks if your contact wishes to add comments to the responding message. They need to *click* the OK button to send the response.



8. The event is added to your contact's Outlook Calendar.
9. Meanwhile, an e-mail message is sent to your Outlook Inbox indicating that an invitation has been accepted.



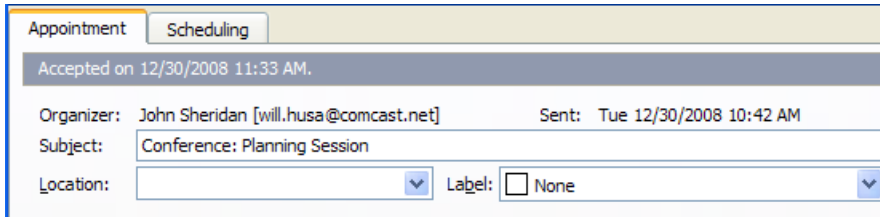
10. In this case, the corresponding message is a general acceptance notification. However, if your contact had only tentatively accepted the invitation, then they should have also added a response as well.



11. Your participant's response has been added to the details about the meeting.

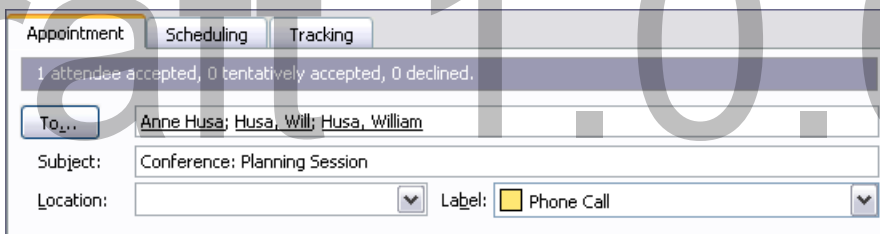
Tracking Meeting Status - Participant

Should your contact wish to review the details of the meeting, then they should double-click on the event. A window opens with the details about the meeting. On the gray area in the upper part of the Appointment tab is the current status of the contact's participation.



Tracking Meeting Status - Organizer

1. If you wish to review the details of the meeting, then double-click on the event on your Outlook Calendar.
2. A window opens with the details about the meeting. On the gray area in the upper part of the Appointment tab is the current status of your contacts' participation.



3. In addition, a tracking tab has been added to this event. When you click on the Tracking tab, details about your participants are displayed. It shows who has accepted your invitation and who has not. This is useful for a follow-up message.

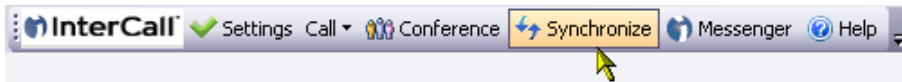
The screenshot shows the 'Tracking' tab in Outlook. The text 'The following responses to this meeting have been received:' is displayed above a table. The table has four columns: Name, Attendance, and Response. The data is as follows:

Name	Attendance	Response
John Sheridan <will.husa@com>	Meeting Organizer	None
Anne Husa	Required Attendee	Accepted
Husa, Will	Optional Attendee	None
Husa, William	Optional Attendee	None
Click here to add a name		

SYNCHRONIZE CONTACTS

You have the ability to synchronize the contacts that you have in Outlook with the contacts you have in InterCall Messenger.

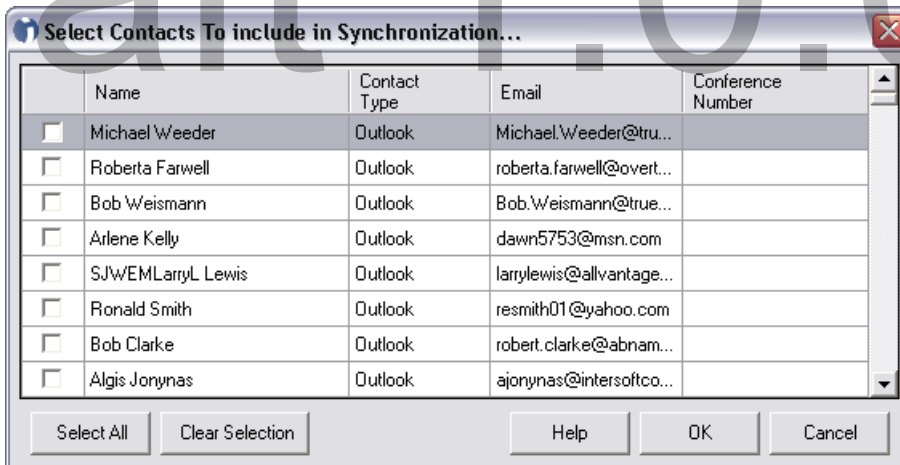
1. On the InterCall UC Toolbar, *click* the Synchronize button.



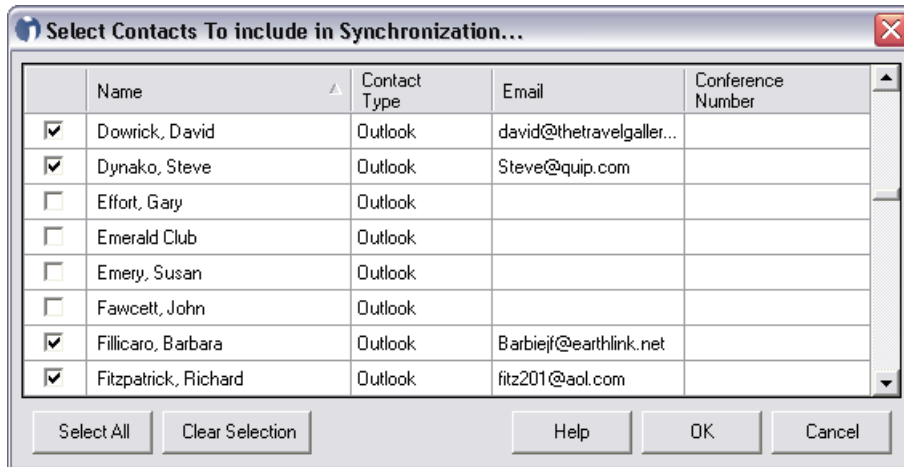
2. The Synchronization Progress window opens asking if you wish to synchronize your contacts. *Click* the OK button.



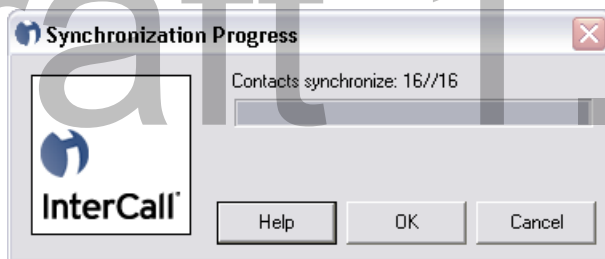
3. The Select Contacts to Include in Synchronization window opens. Use this window to select the contacts you wish to add to your InterCall Messenger window.



4. To assist you with locating your contacts, the system allows you to sort the columns. *Click* on a column header to sort that column.
5. When you have located the contact that you wish to add to your InterCall Messenger; just *click* the checkbox next to that person's name. Be sure to only select contacts that have a phone number.



6. The system gives you the option to add all your Outlook contacts. If this option suits you, then *click* the Select All button.
7. If you change your mind about a selected contact, just uncheck the checkbox next to their name.
8. If you wish to keep this window open, but start the selection process over, just *click* the Clear Selection button. All the checkboxes will clear out.
9. If you wish to start over, *click* the Cancel button.
10. When ready to synchronize, *click* the OK button.



11. The Synchronization Progress window will display the progress of the synchronization. When the process has completed, the window will display the number of contacts that been synchronized. A pop-up window declares that the synchronization was successful.

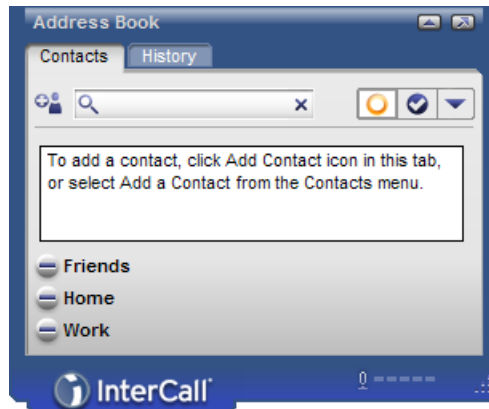


12. The InterCall Messenger will open. If it is not already open, then the Messenger login window will open first. Enter in your login information.
13. The Address Book view of the Messenger will display the contacts that have been synchronized with Outlook.

Potential Errors with Synchronization

I saw the contact names transfer over, but now they are not in the Messenger.

This problem may only occur the first time you attempt synchronization. If you saw the contact names transfer over to the InterCall Messenger, but disappear, it may be because those contacts did not have a phone number in Outlook. The next time that you attempt synchronization, those contact names should transfer over.

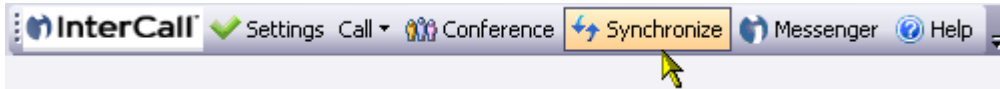


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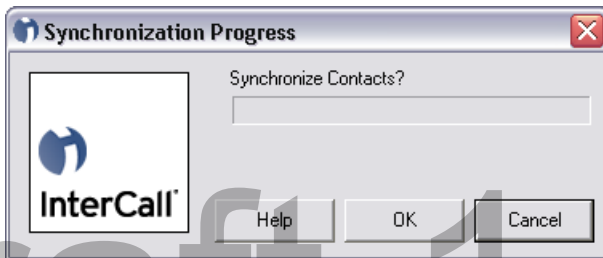
What if I uncheck a contact name in Outlook and perform synchronization?

If you uncheck a name in Outlook and perform synchronization, then only the checked names will transfer over to the InterCall Messenger.

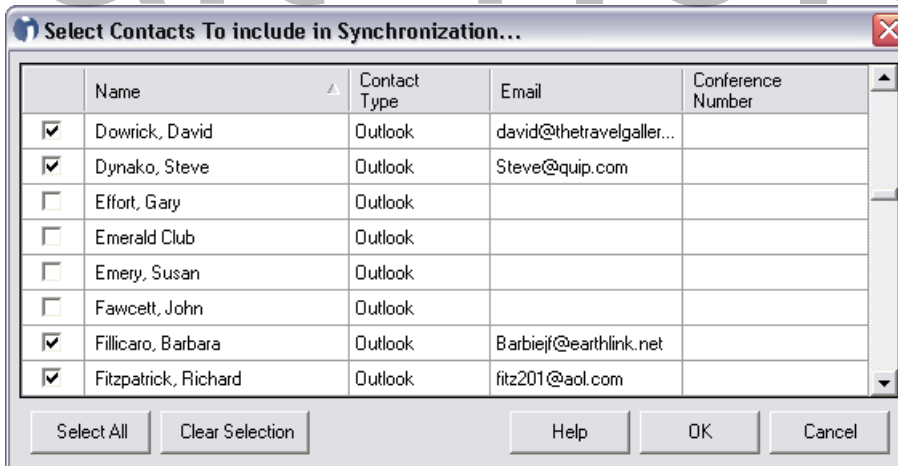
1. Let's assume that you wish to add Arlene Kelly to the list of contact names in the InterCall Messenger.
2. On the InterCall UC Toolbar, *click* the Synchronize button.



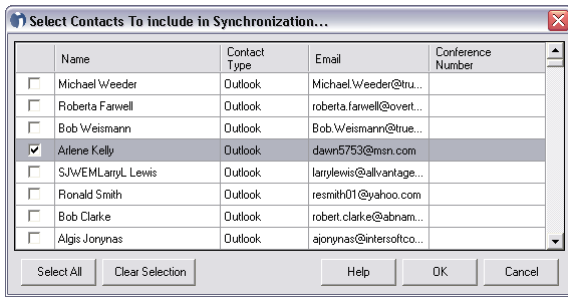
3. The Synchronization Progress window opens asking if you wish to synchronize your contacts. *Click* the OK button.



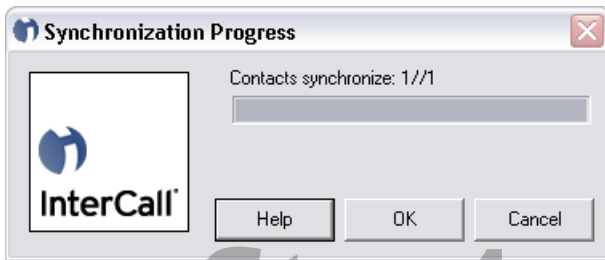
4. The Select Contacts to Include in Synchronization window opens. The current contact names that have been synchronized will be checked.



5. Since you only wish to add Arlene Kelly, then the logical thing to do would be to uncheck all the contacts that you don't need to transfer over again. You would *click* the Clear Selection button.
6. All the checkboxes will clear out.
7. *Click* the checkbox next to Arlene Kelly.



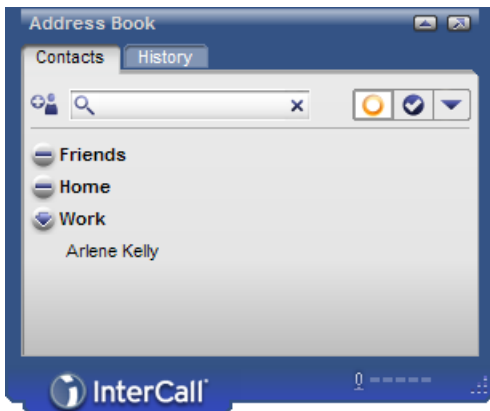
- 8. Click the OK button to start synchronization.
- 9. The Synchronization Progress window will display the progress of the synchronization. When the process has completed, the window will display the number of contacts that been synchronized.



- 10. A pop-up window declares that the synchronization was successful.



- 11. The InterCall Messenger will open. If it is not already open, then the Messenger login window will open first. Enter in your login information.
- 12. The Address Book view of the Messenger will display the contacts that have been synchronized with Outlook.





13. Notice that only one name is listed. That's because you only selected one name in the last synchronization.
14. To keep the same list of names in the Address Book view of the InterCall Messenger, be sure to leave those selected names checked in the Select Contacts to Include in Synchronization window before synchronization.

What if I add a contact name in the Messenger and perform synchronization?

If you add a contact name in the InterCall Messenger Address Book, but do not add the contact name to the Outlook Contacts Directory, then during synchronization, the contact name will be deleted from the Messenger Address Book view.

Therefore, if you wish to add a contact name for use with the InterCall Messenger, then be sure to add the contact name to the Outlook Contacts Directory. Before performing synchronization, *click* the checkbox next to the contact's name in the Select Contacts to Include in Synchronization window.

What if I delete a contact name in the Messenger and perform synchronization?

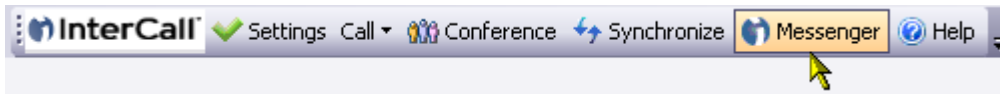
If you delete a contact name in the InterCall Messenger Address Book, but leave the contact name checked in the Select Contacts to Include in Synchronization window, then during synchronization, the contact name will be returned the Messenger.

Therefore, if you wish to remove a contact name from the InterCall Messenger Address Book view, then uncheck the checkbox next to the contact's name in the Select Contacts to Include in Synchronization window before performing synchronization.

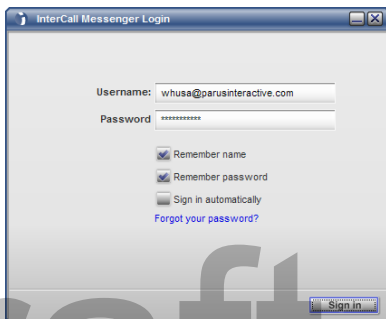
OPEN INTERCALL MESSENGER

You have the ability to open (or switch to) the InterCall Messenger from the InterCall UC Toolbar in Outlook.

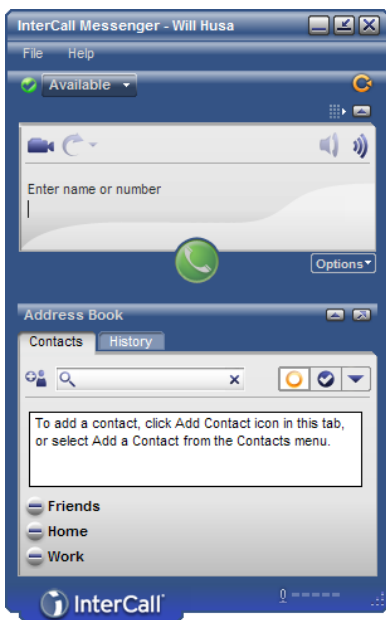
1. From any tab in Outlook, *click* the Messenger button on the InterCall UC Toolbar.



2. If you are not configured for an automatic login, then the InterCall Messenger login window opens first.

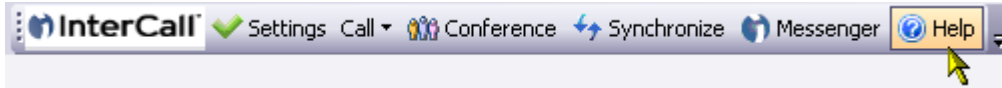


3. In the Username and Password fields, enter in the same email address and password that you used in the installation process.
4. *Click* the Sign In button.
5. The InterCall window opens.



HELP

Assistance is available to help you to better use the features of InterCall Unified Communications. From any tab in Outlook, *click* the Help button on the InterCall UC Toolbar.



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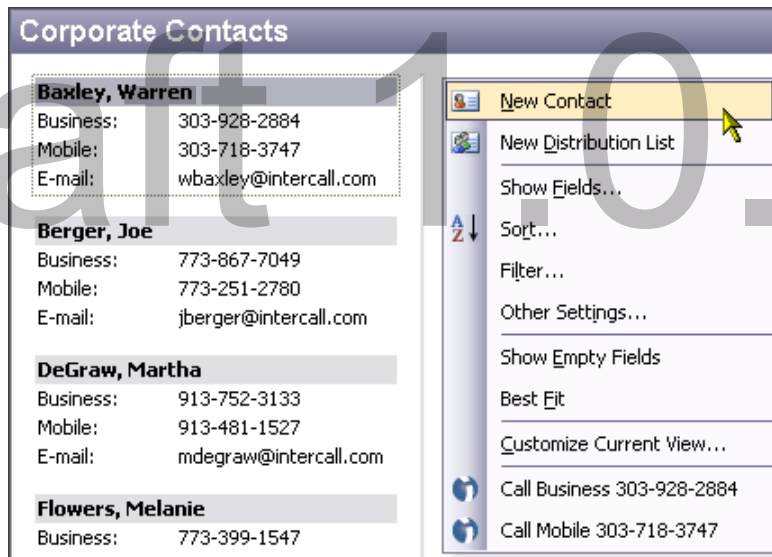
ADD A CONTACT TO THE OUTLOOK DIRECTORY

If you wish to use the Synchronization feature of the InterCall UC Toolbar, then do not use the Messenger Address Book to add contact names. Use Outlook.

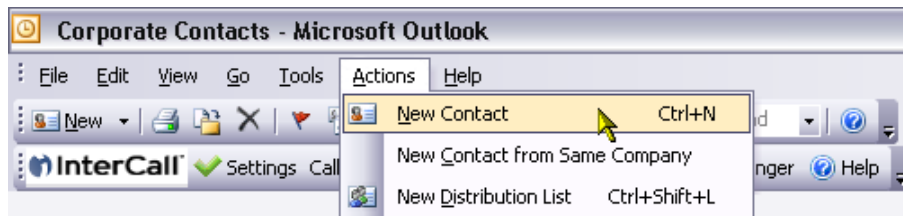
1. On the Contacts tab of Outlook, select a directory to add the new contact.



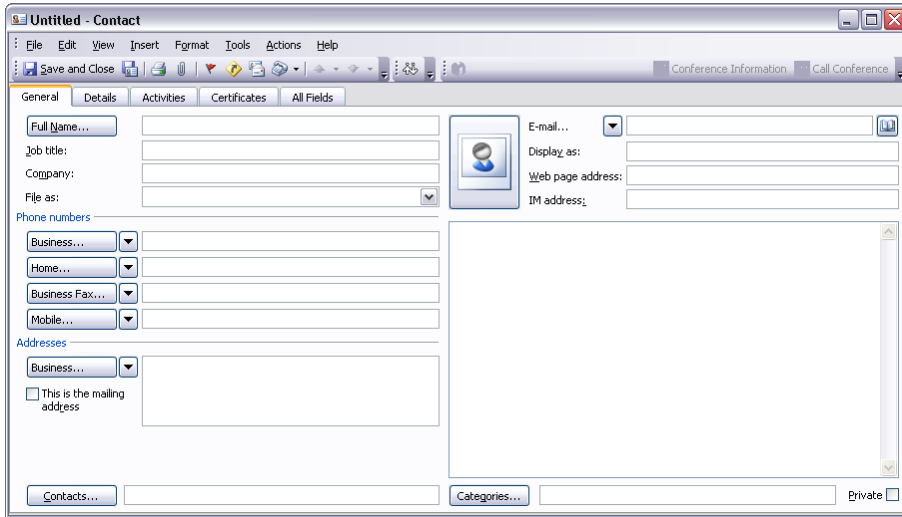
2. Within the selected directory, you may initiate the process to add a contact by one of a few different ways:
 - Double-click on an open area where the contacts are listed.
 - Right-click in an open area where the contacts are listed. From the drop down menu, select New Contact.



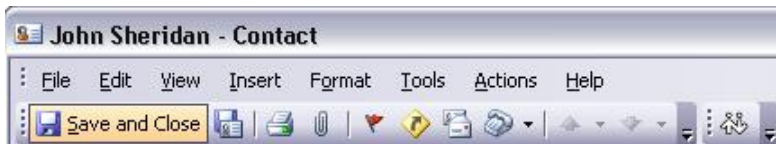
- Select New Contact from the Actions menu.



- A new Contact window opens.



- In the Full Name field, type in the first and last name of the contact. The system assumes that you will enter the contact's name as first name and then last name.
- Click in another field or press the TAB key on the keyboard. The name of the contact window changes to the information entered in the Full Name field.
- In addition, the File As field displays the last name of the contact followed by the first name as entered in the Full Name field.
- Fill in the remaining fields as needed.
- When finished, click the Save and Close button on the Outlook toolbar.



- The new contact has been added to the directory and is ready for synchronization with the InterCall Messenger.

