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CallPilot Message Tab

Check for new messages

Open a message

Playing voice messages

Playing a voice message in a mixed voice or text message

Select a message

Delete a message

Record and send a new voice message

Calling the sender of a message

Forwarding and replying to messages

Adding attachments to messages

Setting message options

Addressing messages

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Follow Up Exercise
Welcome to My CallPilot

My CallPilot* from Nortel is a web-based business communications system that offers exceptional flexibility for managing your messaging needs.

You can work with My CallPilot from any computer that has Internet access and a web browser configured for My CallPilot. Here are some of the many ways you can use My CallPilot:

- Enable record, edit, and delete greetings.
- View useful information about your mailbox.
- Receive, forward, reply to, and send voice messages,
- Change the setup of your mailbox features.
- Change your CallPilot password.
- Create personal distribution lists.

The screen images of dialog boxes shown in this guide are those displayed when operating My CallPilot in the Windows environment, unless otherwise specified. Users of the Macintosh or Linux environments may see altered versions of these dialog boxes, depending on specific feature and functionality support.
Logging in

1. In order to access My CallPilot, open a web browser and enter the supplied URL. You may bookmark this address in your web browser for easy access.

   https://www.voicemail.yorku.ca

2. On the Welcome page, in the Mailbox box, type your mailbox number. This is usually your office telephone extension number.

3. In the Password box, type the password for this mailbox.

4. Click Login.

Do not check the Remember Password box on a shared computer.
Log in using secure login

Click the Enable Secure Login to enable SSL encryption. The Login Securely button appears. You may bookmark the link for future log in.

Log in remotely

You can log into My CallPilot remotely, with any computer, provided you have a Passport York Account and supported browser configuration. You can use the pre-installed audio player for voice messages, or you can download the CallPilot Player for full feature capability. Open your web browser and type the following url:

https://www.voicemail.yorku.ca

Logging out

To log out from My CallPilot, click Logout on any My CallPilot page.
Downloading CallPilot Player

The first time you log in, you will need to download your CallPilot player. To download your CallPilot Player:

1. Click on the CallPilot **Features Tab**.
2. Select **Downloads** under CallPilot Tools.
3. Click on **CallPilot Player & MWI icon** or another audio player from the list to download the software.
4. Once the download is complete, run the installation program to install the software.
Useful Information tab

1. Click the Useful Information tab to:
   - View status and details about your mailbox.
   - View online user guides.
   - Print online user guide files on your laser printer.

![Useful Information Tab Image]

![Mailbox Status Image]

![CallPilot Access Numbers Image]
CallPilot Features Tab

Click the CallPilot Features tab to change the settings for your CallPilot features and telephone options, and to set preferences for web-based access.

Click any title to open its settings page.

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Setting messaging preferences

You may change any of these My CallPilot settings:

- set logon and confirmation options
- define message and message list appearance
- create a signature for outgoing messages
- select audio options for voice messages
- specify how often to check for new messages

1. Click on the CallPilot Features Tab
2. Select My CallPilot Preferences under CallPilot Tools
**Change Message List columns**

You can select the columns you want to appear in your message list (please refer to page 9 for an image of a standard message list):

1. In the Message List section, select the columns to display.
2. To show a column, select the column in the Available Columns list, and then click ➔.
3. To hide a column, select the column in the Displayed Columns list, and then click ◀.
4. To change the position of a column, select it in the Displayed Columns list, and then click Move Up or Move Down.
5. In the Number of messages per page list, select the maximum number of messages to display per page. If you are using a dial-up connection, select a lower number to reduce download time.
6. Click Save.

The Attachments option must be in the Displayed columns list in order to see the embedded player (windows only) in your message list. If the column is hidden, you can open a message to view or play components.
Add a signature

In My CallPilot, you may send text messages to other mail boxes, or add a text message when you reply to or forward any voice messages. This may be used instead of recording a voice introduction to your message. The “Add a Signature” option lets you append a signature automatically to any outgoing text message.

1 In the Signature Settings section, type your signature in the text box.

2 To automatically add your signature to outgoing messages, check Automatically add signature to outgoing message.

3 Click Save.

Change environment settings

You can change any of the following My CallPilot settings to your personal preferences.

a) Show BCC - Display the blind carbon copy (BCC) box in messages.

b) Show Priority, Sensitivity, and Receipt Msg Notification - Select this check box if you want to be able to request read receipts, and to select the priority and sensitivity of messages. If you clear this option, you can only send messages with Normal priority and Normal sensitivity, and you cannot request read receipts.

c) Notify me when a new message is read - Receive a notification message when a recipient opens a message you sent in My CallPilot. Your recipient's e-mail system must be able to generate a read receipt in order for this feature to work.

d) Confirm when messages are sent - Display a confirmation message when a message is sent.
e) **Confirm deletions** - Prompt for confirmation when you delete messages.

f) **Remove Deletable items on logout** - Empty messages marked for deletion (in the Deleted Items view) when you log off My CallPilot.

g) **Message checking interval** - Specify how often to check for messages in the Check for new messages every list.

h) **Automatically logout after** - Specify the number of minutes of inactivity after which My CallPilot logs off.

i) **Audio Options** - Select the audio format to use from the Audio list:

- **CallPilot (VBK)** - Select this format to play and record CallPilot voice messages in VBK format. Use this option when you send voice messages to CallPilot recipients.

- **Standard (WAV)** - Select this format when you want to play and record messages in WAV format for a non-CallPilot recipient.

j) **Number to call for telset playback** - Type the telephone number to use when you play or record messages in My CallPilot using the telephone.

k) Click **Save**.

When selecting deleting options, keep in mind that messages marked for deletion remain in your mailbox and continue to use up storage space until they are permanently deleted from your mailbox.
Choosing a home page for My CallPilot

You can choose the page that you want to display automatically when you log in to My CallPilot.

My CallPilot Home Page
Choose your default home page.

Available CallPilot pages:
- CallPilot Messages
- CallPilot Features
- Useful Information
Changing your telephone options

Custom Operator Number

CallPilot offers your callers the option of leaving a message or speaking to one of your assistants or colleagues by pressing “0”. In order to activate this option, you need to enter a valid telephone extension in the Custom Operator Number box.

1. Click on the CallPilot Features Tab.
2. Click on Telephone Options.
3. In your greeting, tell callers to press zero if they wish to speak to this person in your absence.
4. In the For Callers section, type the telephone number to use when callers press 0 in the Customer Operator Number box.

![Image of CallPilot interface showing Custom Operator Number settings]

Click on the CallPilot Features Tab. Click on Telephone Options. In your greeting, tell callers to press zero if they wish to speak to this person in your absence. In the For Callers section, type the telephone number to use when callers press 0 in the Customer Operator Number box.
Message reception blocking

If you are out of the office and do not want to receive messages during that time, you can temporarily block message reception. You must have message blocking capability to set this option.

1 Click on the CallPilot Features Tab
2 Click on Telephone Options
3 In the For Callers section, specify when to block message reception in the Block Callers from leaving messages list:
   - Never - Allows callers to leave messages.
   - Always - Does not allow callers to leave messages.
   - Only when temporary greeting recorded - Only blocks message reception when the temporary greeting is recorded.
4 Specify how to handle blocked calls:
   - Transferred to custom operator - When message reception is blocked, play the mailbox greeting and then transfer the caller to the number specified in the Customer Operator Number box.
   - Disconnected - When message reception is blocked, play the mailbox greeting and then disconnect the call.
5 Click Save.

Only use message reception blocking when absolutely necessary. As a courtesy to your callers, when you enable this feature, you should change your mailbox greeting to inform callers that they cannot leave a message.
Message Waiting Indicator

Message Waiting indicator is the red light on your phone that lights up when you have a message. To enable or disable Message Waiting Indicator:

1. To enable, click in the box under enabled to add a checkmark.
2. To disable, click in the box under enabled to remove the checkmark.
Greetings

The Voice Greetings feature allows you to record and manage your voice greetings from My CallPilot. You can record external, internal and temporary greetings and your Personal Verification:

- **External Greeting** – The greeting callers from outside your organization hear when leaving you a message
- **Internal Greeting** – The greeting callers within your organization hear your when leaving you a message. If you do not record an internal greeting, all callers hear your external greeting.
- **Temporary Greetings** – The greeting played to all callers in place of your internal and/or external greetings until it expires or you delete it.
- **Personal Verification** - Personal verification is your recorded name in your own voice, so callers can correctly identify you when leaving a voice message.

The Greeting page lets you record, play, delete, and import voice greetings. It also shows the greeting status (recorded/not recorded) and allows you to assign expiry dates to a temporary greeting.

The CallPilot Player is required to record/play greetings from My CallPilot. An alert appears if CallPilot Player is not installed and you try to play/record greeting/personal verification. You can import WAV files for greetings. The files can be imported with or without the CallPilot Player. If the CallPilot Player is not installed, you can record/save a WAV file from another media application and import the WAV file using My CallPilot.

For Internet Explorer users:
If the CallPilot Audio Player is present, the audio player is embedded directly in the web page.

For Netscape Navigator users:
The stand-alone audio player is used to record and play voice greetings and personal verification. The CallPilot Player can be launched by pressing the Edit button, or from the Windows Start menu.
Recording a greeting

1. Click on the CallPilot Features Tab

2. Click on Greetings

3. To record using your telephone, click on the telephone icon next to the CallPilot Player. If you have a microphone, you can record a greeting through your computer by clicking on the computer icon next to the Call Pilot player.

4. Click the Edit button to activate a specific greeting. When activated, the greeting text is shown in a bold italic font.

5. If using your telephone, a prompt will appear to say it is calling you at your extension.

6. When your telephone rings, answer it. At the tone, record your message into the handset.

7. When you finish speaking:
   - To end the recording, click the stop button.
   - To review the recording, click the play button.

8. When you are satisfied with the greeting, press the Save Greeting button to make the changes permanent. If you do not press the Save Greeting button, an alert appears.

9. When you are finished, click the disconnect icon or hang up the telephone.

10. A checkmark will appear in the “Recorded” column when you have successfully recorded a greeting.
Setting an expiry date for Temporary Greetings

The expiry date/time corresponds to the date/time on the CallPilot server. The expiry date is validated by My CallPilot.

1 Click on the CallPilot Features Tab
2 Click on Greetings
3 Select the radio button beside the date and enter the date and time.

You may delete your temporary greeting by pressing the delete icon beside temporary greeting, otherwise, all callers with be played your temporary greeting until it expires.

Personal Verification

Personal verification allows you to record your name in your own voice, so callers can correctly identify you when leaving a voice message. You can record your personal verification in the same way you record a regular greeting.

Removing voice greetings and personal verification

Voice greetings and personal verification can be removed by pressing the Delete Button. You must confirm the deletion before the voice greeting or personal verification is removed.


**Importing a greeting recorded with a stand-alone audio device**

You can record and then import a new or changed greeting using the stand-alone CallPilot Player or any other audio device that supports WAV format.

1. Open your audio device and record a voice greeting or personal verification.

2. To open the stand-alone CallPilot Player, from the Windows Start menu, choose Programs > Nortel > CallPilot Desktop Messaging Audio Player.

3. Save the recording. For the CallPilot Player, save in VBK format. For other audio devices, save in WAV format.

4. Click the **CallPilot Features** tab, and then click the **Greetings** item.

5. Click the **Import** icon beside the greeting type.

6. Click **Browse**, select the audio file, and then click **Open**.

7. Click **Save**.
Follow Up Exercise

Objective

Record a Temporary Greeting with a set expiry date. For additional help, refer to “Greetings” on Page 17.

1. Click on the CallPilot Features Tab
2. Click on Greetings
3. Click on the telephone icon next to the CallPilot Player
4. Click the Edit button next to Temporary Greeting. A prompt will appear to say it is calling you at your extension.
5. When your telephone rings, answer it. At the tone, record your message into the handset.
6. When you finish speaking:
   - To end the recording, click the stop button.
   - To review the recording, click the play button.
7. When you are satisfied with the greeting, press the Save Greeting button to make the changes permanent.
8. When you are finished, click the disconnect icon or hang up the telephone.
9. Set the expiry date to 2 weeks from today.
Changing your CallPilot password

Your CallPilot password is the same password that you use to log in to CallPilot from the telephone.

CallPilot prevents you from using some passwords if they are too short or too simple, or if you have used the same one recently. Keep your mailbox secure by choosing passwords that are not easily discovered.

1. Click on the CallPilot **Features Tab**
2. Click on **Change Password**
3. Type your current password in the **Enter Old Password** box.
4. Type your new password in the **Enter New Password** and **Retype New Password** boxes.
5. Click **Save**. CallPilot verifies your existing password, and then replaces it with your new password.

![Change Password Form](image-url)
Managing personal distribution lists

A distribution list saves you time when you send messages to the same group of addresses. You can create up to 99 personal distribution lists, and enter a number and name to identify each list. Each personal distribution list can contain up to 200 entries.

A personal distribution list can contain any addresses to which you can send a message, except other personal distribution lists. An entry can be a mailbox number, shared distribution list number, network mailbox, open network mailbox, or telephone number.

You can create personal distribution lists in My CallPilot or on your telephone. These lists are stored for you in the CallPilot Address Book on the CallPilot server. You can access these lists from My CallPilot, Desktop Messaging, and your telephone.

Create, modify and delete personal distribution lists

To create a distribution list

1. Click on the CallPilot Features Tab
2. Click on Personal Distribution Lists
3. Click on Add New List.
4. In the Distribution List Information section, assign a number and name to the list. The distribution list number must be between 1 and 99.
Number - Select a number to identify the distribution list.
Name - Type a descriptive name for the distribution list.

5 In the Add/Remove Members section, select the recipients to include in the distribution list. The information required depends on the selected address type. You may choose address book to search the My CallPilot directory or Telephone number to type an external local number.

6 Click Add to add as many list members as necessary.

7 Click Save.

To modify a distribution list

1 To edit an existing list, select the edit button next to the distribution list.
2 Make the changes, then click Save.

To delete a distribution list

1 Click the delete button next to the distribution list to delete.

2 Click Save.
Follow Up Exercise

Objective

Create a Personal Distribution list. For additional help, refer to "Managing Personal Distribution Lists" on Page 22.

1. Click on the CallPilot Features Tab
2. Click on Personal Distribution Lists
3. Click on Add New List.
4. In the Distribution List Information section, assign a number and name to the list.
5. In the Add/Remove Members section, select the recipients to include in the distribution list using the Address Book and Find Last Name feature.
6. Add at least 3 list members.
7. Click Save.
CallPilot Message Tab

To access your CallPilot messages, click the CallPilot Messages tab. You can access voice messages and view faxes, delete, forward, and reply to messages, and compose new messages.

Use the embedded CallPilot player, if available, to play and record voice messages.

Attachments:
- Voice
- Text

Check for new messages

To see new messages, click Refresh. New messages appear in Bold.

You can sort your mailbox message list through the

- Read/Unread
- Priority
- Subject columns,
- also the From and Received columns

The messages are sorted by simply clicking on the column headings. Only the messages currently displayed are sorted, which may not be the entire message list.
Open a message

To open a CallPilot message, click the voice or text icon in the Attachments column beside the message, or click any underlined part of the message line.

Playing voice messages

Before playing voice messages, you can choose to play voice messages through your telephone or your computer. Click the Telephone or Computer icon in the embedded or downloaded CallPilot Player. (To record and play messages using the telephone, you must have a properly configured firewall, or no firewall between you and the web server.)

To play a voice message the quick way (Windows only) use the embedded CallPilot Player, if available, to play your voice messages quickly. Note that the player can also play WAV format audio files.

1. In your Message List, click the Voice (Play) icon in the Attachments column beside the message you want to play. Note that this icon appears as a telephone instead of a black arrow if your audio format is set to WAV in your My CallPilot Preferences.

2. When the audio controller window appears press the Play button if playing does not start automatically.
   - If you selected Computer for playback, the audio player plays your message from your computer’s speakers.
   - If you selected Telephone for playback, your telephone rings and plays the message when you answer.

3. Use the player buttons to stop, re-play, or call the sender. The slider control on the player permits positioning within a recording. The volume level and the play rate (speed) can also be adjusted when using the embedded player.

4. Click Disconnect or hang up the telephone when you are finished.
Playing a voice message in a mixed voice or text message

CallPilot messages can have more than one type of attachment. In your message list, each attachment appears as a different icon beside the message in the attachment column.

In a mixed voice or text message, open the message to select each part.

1. In your Message List, click any underlined part of the message to open it.

2. In the open message, click the **Voice** icon. The audio player opens.
   - If you selected **Computer** for playback, the audio player plays your message from your computer’s speakers.
   - If you selected **Telephone** for playback, your telephone rings and plays the message when you answer.

3. Use the player buttons to stop/pause, re-play, or call the sender (Windows only).

   Note: On the Macintosh CallPilot Player, there is no Stop button. When you click the Play button, play begins and the Play button then becomes the Pause button. In addition, the audio control commands can be accessed through the Audio menu of the Macintosh CallPilot Player.

4. Click the **Disconnect** (Windows) or **Hang Up** (Mac) button, or hang up the telephone when you are finished. Click Message List to return to your messages.

Select a message

To select a CallPilot message, check the box at the far left of the message line. When a message is selected, you can delete, forward, reply to it, or you can call the sender.

Delete a message

To delete a CallPilot message, select the message and click **Delete** or **Delete Now**.

- **Delete** - the message is permanently deleted when you log out.
- **Delete Now** - all selected messages are permanently deleted immediately.
Record and send a new voice message

1. In your Message List, click **Compose**. A new message page opens.
2. Click **To**… (or **Address Book**) to choose an address from the CallPilot Address Book, or click **Special Addresses**. See **Addressing messages**, on page 35.
3. In the **Enter Last Name** (or *) box, do one of the following:
   - To look up a single address, type the recipient’s last name (or just the first letter or first few letters), and then click **Find**.
   - To get a list of all entries in the Address Book, type an asterisk (*), and then click **Find**.
4. In the list of names, select the name of the recipient or distribution list, and then click **To**. You can look up additional names as required. To add more names, select the name, and then click either **To**, **Cc**, or **Bcc**. (Bcc stands for blind carbon copy; the recipient gets a copy of the message, but the recipient’s name is not visible to other recipients of the message. When finished, click **Ok**.
5. Add a subject description in the **Subject** text box.
6 In the embedded or downloaded Windows CallPilot Player, select the Telephone or Computer icon. If you are using a Macintosh, select either Use Telephone or Use Macintosh from the CallPilot Player’s Audio menu.

Note: If you select the telephone to record the message, ensure you have your telephone number configured in My CallPilot. To check, click the My CallPilot Features tab, and then click the My CallPilot Preferences item. In the Environment Settings, ensure your telephone number is entered in the Number to call for telset playback (ie. your phone) box.

7 To begin recording your message, click the Record button.

- If you are recording from the computer, record your message into the microphone.
- If you are recording from the telephone, answer when the telephone rings. At the tone, record your message into the handset.

Note: Saving your audio works a little differently depending on which version of the CallPilot player you are using. If you use the embedded version, the Save Audio button only saves the message as an attachment to the current message. If you use the downloaded (stand-alone) version, you save the recording as a file, which you then attach to your message. If you are using the stand-alone version of the Player, add your voice message file as an attachment and set options if required.

8 When you finish speaking:

- To end the recording, click the stop button.
- To review the recording, click the play button.
- To add to the recording, click the record button, speak again, and then click the stop button.

9 If you are using the telephone, when finished, click the disconnect icon or hang up the telephone.

10 When you are satisfied with the message, click Save Audio. This automatically adds the recording as an attachment to the message.

11 Click Send.
**Calling the sender of a message**

You can respond to a message with a telephone call instead of a recorded message. My CallPilot includes a Call Sender button that appears in both the Message List and Open Message views. Clicking the Call Sender button calls the sender of the currently selected message, regardless of whether or not the message contains an audio attachment.

1. From the Message List, put a checkmark beside the sender you would like to call and click the **Call Sender** button. If you already have the message open, just click **Call Sender**.

2. A dialog box appears asking you to verify the phone number.

3. **Verify** the number. For outside calls, you must add a 9 before the area code and number.

4. Click either **Call** or **Call sender**.

5. Your telset will ring. When you answer the call, My CallPilot calls the specified phone number.

NOTE: This Make Call feature contains no error detection after the call has been placed, and My CallPilot does not have control over the call or your telset after the call has been placed.
**Forwarding and replying to messages**

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.

**To forward or reply to a message**

1. In an open message, click **Forward**, **Reply**, or **Reply All**.
2. On the new message page, compose a voice or text message.
3. Address forwarded messages the same way as a new message. Replies are addressed automatically.
4. Add attachments, set options, and change the Subject line if required.
5. Click **Send**.

**Adding attachments to messages**

Before sending a message, you can attach one or more voice or text files to it. Voice files can be either VBK or WAV format for both Windows and Macintosh CallPilot recipients. My CallPilot automatically converts VBK files to WAV files when sending to non-CallPilot users. Text files must be TXT format.

**To attach a file to a message**

1. On a new message page, click **Attach Files...**
2. In Add Attachments, click the **browse** button to browse for and select the files that you want to attach.
3. Click **Open**.
4. Click **Attach Selected File** button.
5. Click **OK**. The icon for the attached file appears beside the **Attach Files** button on the new message.
6. Continue to compose, address, and send the message as usual.
Setting message options

Before sending a message, you can set options for handling and delivery. These options will only be available to you if you have selected the “Show Priority, Sensitivity, Read Msg Notification” checkbox in your My CallPilot Preferences.

To set message options

1. On a new message page, select **Priority**, **Sensitivity**, and **Receipt** options, as required.
   - For **Priority**, select **Low**, **High**, or leave the setting as **Normal**.
   - For **Sensitivity**, select **Private**, or leave the setting as **Public**.
   - For **Notify me when message is read**, check the box to request acknowledgment that your recipient received the message.

2. Continue to compose, address, and send the message as usual.

Note: You cannot forward messages that are marked **Private** to other CallPilot users. However, be aware that when you send a message marked **Private**, your recipient can still forward the message to someone else, if the recipient is not a CallPilot user. Also, recipients in non-CallPilot systems are not informed of Private settings. In your message, tell the recipient that the message is private.
Addressing messages

You can address a CallPilot message in two ways:

- Select a name from the CallPilot Address Book that is maintained on the server. The Address Book contains the addresses of the CallPilot users and shared distribution lists that you can use. You cannot edit this list.
- Manually enter or select addresses on other servers.

To address a message from the Address Book

1. In a new CallPilot message, click To (or Address Book). The “Select recipients from the Address Book” dialog box appears.

2. In the Enter Last Name (or *) box, do one of the following:

   - To look up a single address, type the recipient’s last name (or just the first letter or first few letters), and then click Find.
   - To get a list of all entries in the Address Book, type an asterisk (*), and then click Find.

3. In the list of names, select the name of the recipient or distribution list, and click To.

4. You can look up additional names as required. To add more names, select the name, and then click either To, Cc, or Bcc. (Bcc stands for blind carbon copy; the recipient gets a copy of the message, but the recipient’s name is not visible to other recipients of the message.)
To address a message in Special Addresses

1. In a new CallPilot message, click **Special Addresses**. The Enter a Special Address dialog box appears.

2. Select an address format from the drop-down list (for example: Telephone Number or Personal Distribution List). Note that Personal Distribution List entries appear alphabetically sorted when doing an Address Book search.

3. Type the number and any other information required. Refer to the online Help for the correct addressing formats.

4. Click **To**.
Follow Up Exercise

Objective

Practice composing, recording, and playing messages and using the “Call Sender” feature. For additional help, refer to Pages 26-35.

Compose, Record and Send a new voice message

1. In your Message List, click Compose.

2. Click To... and choose your partner’s address from the CallPilot Address Book.

3. In the embedded or downloaded Windows CallPilot Player, select the Telephone icon.

4. To begin recording your message, click the Record button. Answer when the telephone rings.

5. At the tone, record your message into the handset.

6. Click Stop to end the recording.

7. Click Save Audio and Hang up.

8. Click Send.

Play your new voice message

1. Select the Telephone icon for playback.

2. In your Message List, click the Voice (Play) icon in the Attachments column beside your new message.

3. Use the player buttons to stop, re-play, or call the sender. Practice adjusting the volume level and the play rate (speed).

4. Click Disconnect or hang up the telephone when you are finished.
Follow Up Exercise…Continued

Call sender

1. Select the **Telephone icon** for playback.
2. Put a checkmark beside the sender’s message.
3. Click the **Call Sender** button.
4. **Verify** the number.
5. Click **Call**.
6. Your telset will ring. Click ok after you have picked up the handset.

Reply to message using a text message

1. From the CallPilot messages tab, put a checkmark beside the sender’s message and click **Reply**.
2. Type your text reply in the text box and change the Subject line.
3. Click **Send**.