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# **CallPilot Manager**

## **Set Up and Operation Guide**

**NORTEL**  
**NETWORKS™**

# CallPilot Manager Set Up and Operation Guide

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# Chapter 1

## Getting started with CallPilot Manager

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### About CallPilot Manager

CallPilot Manager is a web-based application that you use to set up and administer CallPilot. CallPilot is a versatile business communications tool that you can use to:

- answer incoming calls
- offer callers a selection of options to route their calls or access information
- provide advanced voicemail, Automated Attendant and call handling capabilities

This guide leads a System Administrator through setting up and operating CallPilot on a Business Communications Manager 2.5 or a CallPilot 150 system. CallPilot works with your Business Communications Manager or Norstar phone system.

This guide also explains how to record Broadcast and Information messages.

### CallPilot features

CallPilot includes these features:

#### **Voicemail**

Records messages and stores them in a mailbox for easy retrieval. Business telephones on your system can have their own mailbox and greeting. Information can be distributed quickly to departments and workgroups.

#### **Automated Attendant**

The CallPilot answering service that answers your business calls promptly, 24 hours a day, with a Company Greeting, plays a list of options to callers, and performs call routing functions in response to caller selections.

#### **Custom Call Routing (CCR)**

Enhances the Automated Attendant menu with customized menus and information messages. With CCR you can determine the menu options and record the voice prompts that guide callers along call paths.

#### **Fax Answering**

Fax Answering lets outside callers send faxes to the main site telephone number. Fax Answering is available even if you do not have the Fax option installed on your system. With Fax Answering, a fax call that arrives through the Auto Attendant or CCR transfers to a specified extension. The extension is usually a fax machine connected by an Analog Terminal Adapter (ATA) or an Analog Station Module (ASM).

## CallPilot options

CallPilot has options that enhance your office communications. You need a software authorization code to enable a CallPilot option. Contact your vendor if you want to trial or purchase a software authorization code.

CallPilot options are:

### Message Networking

Message Networking links your CallPilot system with other voicemail systems and allows the exchange of voice messages between users at different sites. CallPilot supports Digital networking and Audio Messaging Interchange Specification (AMIS) networking.

For information about networking refer to the *CallPilot Message Networking Set Up and Operation Guide*.

### Call Center

Call Center is an application that handles incoming calls as efficiently and economically as possible. Call Center answers calls, then routes the calls to agents in a skillset that most closely matches the needs of the caller. Calls can be routed based on the origin of the call, the destination of the call, or the information entered by the caller. Callers can be given high or low priorities. Callers can overflow to different groups or skillsets of agents, transfer out of the system, leave a message, and hear announcements or informative messages.

For information about Call Center refer to the *Nortel Networks Call Center Set Up and Operation Guide*.

If you use CallPilot 150 you can set up either CallPilot or Call Center as the primary application on your system.

### Fax

Fax is a CallPilot option that enhances your office communications by providing incoming and outgoing fax capability. With Fax, callers can send and retrieve fax messages as easily as they send and retrieve voice messages. The Fax option includes Fax Mail, Fax On Demand and Fax Overflow. Fax Answering is available even if you do not have the Fax option installed on your system.

For information about Fax refer to the *CallPilot Fax Set Up and Operation Guide*.



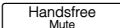
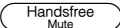


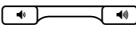
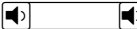



Fax is not available for CallPilot 150.





### Unified Messaging


With Unified Messaging subscribers can use their email application to access voice, fax and text messages from their personal computer. Unified Messaging can be used with several popular email applications.


## About telephone buttons


This table shows the Nortel Networks Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

Button name	T7100, T7208, T7316	M7100, M7208, M7310, M7324	M7100N, M7208N, M7310N, M7324N
Feature		Feature	
Handsfree	Bottom right-hand button		
Hold		Hold	
Volume Control			
Release		Rls	

You can enter , Feature or  and the code to use a feature. For example, press  9  1 to access your mailbox.


The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press  on the T7100 terminal.

On T7100 terminals, you can answer a second call by pressing . Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

The T7100 terminal does not have a  button.

## Symbols and conventions used in this guide

These conventions and symbols are used to represent the Business Series Terminal display and dialpad.

Convention	Example	Used for
Word in a special font (shown in the top line of the display)	P <code>swd</code> :	Command line prompts on display telephones.
Underlined word in capital letters (shown in the bottom line of a two line display telephone)	<u>PLAY</u>	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons		Buttons you press on the dialpad to select a particular option.

## How to get help

### USA and Canada

#### Authorized Distributors - ITAS Technical Support

**Telephone:**

1-800-4NORTEL (1-800-466-7835)

If you already have a PIN Code, you can enter Express Routing Code (ERC) 196#.

If you do not yet have a PIN Code, or for general questions and first line support, you can enter ERC 338#.

**Website:**

<http://www.nortelnetworks.com/itas/>

**email:**

[naitas@nortelnetworks.com](mailto:naitas@nortelnetworks.com)

#### Presales Support (CSAN)

**Telephone:**

1-800-4NORTEL (1-800-466-7835)

Use Express Routing Code (ERC) 1063#

### EMEA (Europe, Middle East, Africa)

#### Technical Support - CTAS

**Telephone:**

00800 800 89009 or 33 4 9296 1341

**Fax:**

33 49296 1598

**email:**

[emeahelp@nortelnetworks.com](mailto:emeahelp@nortelnetworks.com)

### CALA (Caribbean & Latin America)

#### Technical Support - CTAS

**Telephone:**

1-954-858-7777

**email:**

[csrsmgmt@nortelnetworks.com](mailto:csrsmgmt@nortelnetworks.com)

### APAC (Asia Pacific)

#### Technical Support - CTAS

**Telephone:**

+61 388664627

**Fax:**

+61 388664644

**email:**

[asia\\_support@nortelnetworks.com](mailto:asia_support@nortelnetworks.com)

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## Chapter 2

# Using CallPilot Manager

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## Requirements for CallPilot Manager

CallPilot Manager operates on a CallPilot 150 or Business Communications Manager 2.5 system. You access CallPilot Manager on a web browser from a computer on your network.

### System requirements

Before you use CallPilot Manager, your Business Communications Manager 2.5 or CallPilot 150 system must be configured and CallPilot must be initialized.

### Computer requirements

The computer you use to run CallPilot Manager must have:

- WinNT or Windows workstation running P133 or later CPU (or compatible)
- 64 MB RAM, 10 MB disk space
- minimum screen resolution of 1024 X 768 pixels

### Browser requirements

To use CallPilot Manager you must have:

- Java Virtual Machine 5.0 (build 5.0.0.3188 or later)
- either Netscape Communicator 4.0.5 or later but not 6.0, or Microsoft Internet Explorer 4.0 or later, but not 6.0

If you use Netscape Communicator, set the following parameters:

- Enable Java: on
- Cached document comparison: every time

If you use Microsoft Internet Explorer, set the following parameters:

- Check for newer versions: every visit to the page
- Java JIT compiler enabled: on

For more information about these settings, refer to your web browser's Help.

If not all the CallPilot settings shown in this guide appear in your browser:

- refresh the browser by clicking Refresh or Reload
- upgrade your browser

## Starting CallPilot Manager

### From Business Communications Manager 2.5

- 1 Point your web browser to `http://<IP address>:6800/CallPilotManager` where <IP address> is the IP address of Business Communications Manager 2.5. The Administration Login page appears.
- 2 In the **Password** box type your password.
- 3 Click the **Submit** button. The CallPilot Manager Main Menu appears.

### From CallPilot 150

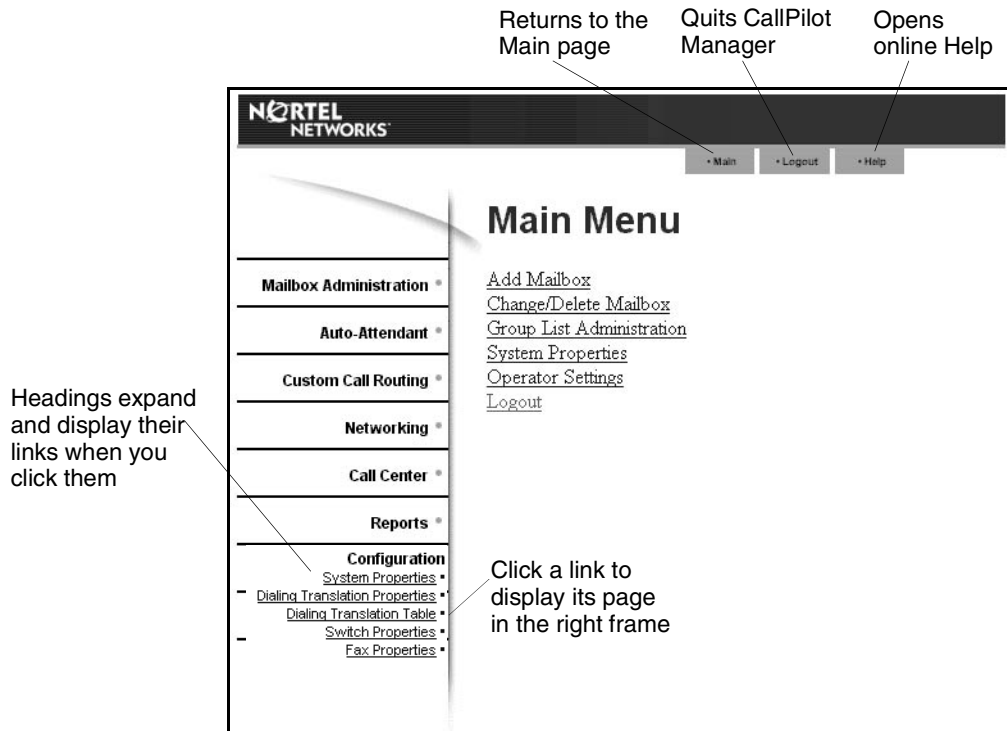
- 1 Point your web browser to `http://<IP address>/CallPilotManager` where <IP address> is the IP address of the CallPilot 150. The Administration Login screen appears.
- 2 In the **Password** box type your password.
- 3 Click the **Submit** button. The CallPilot Manager Main Menu appears.



**Note:** If you want to change the password:

- select the **Prompt for New Password** check box
  - click the **Submit** button
-

## About the CallPilot Manager interface



### System timeout

A CallPilot Manager session times out after 10 minutes of inactivity. This is a security feature that prevents unauthorized access to the system.

If your session times out, the login page appears and a message that says that the session has timed out. You must log on to continue programming CallPilot.

If the system times out while you are working on a page, any settings that you have not entered on the system by pressing the Submit button are not entered. You must log on to CallPilot Manager and re-enter this programming.

## Resetting the System Administrator password

If you forget the System Administrator password, you must reset the password through a Nortel Networks Business Series Terminal. The password resets to the default password 0000. You must then log on to CallPilot Manager using the default password 0000 and create a new password.



**Note:** If you reset the System Administrator password, log on to CallPilot Manager and create a new password immediately to prevent unauthorized access to the system.

### To reset the System Administrator password

- |   |   |
|---|---|
| Set <xxxx><br>OK                          | 1 Press <input type="button" value="0"/> <input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="5"/> .   |
| The Voicemail DN appears on your display. |   |
| Pswd:<br>RETRY OK                         | 2 Press <input type="button" value="9"/> .  |
| Pswd:<br>RETRY OK                         | 3 Enter Resetsmpswd or<br><input type="button" value="7"/> <input type="button" value="3"/> <input type="button" value="7"/> <input type="button" value="3"/> <input type="button" value="8"/> <input type="button" value="7"/> <input type="button" value="6"/> <input type="button" value="7"/> <input type="button" value="7"/> <input type="button" value="9"/> <input type="button" value="3"/><br>and press <u>OK</u> or <input type="button" value="#"/> . |
| Reset Pswd?<br><u>YES</u> NO              | 4 Press <u>YES</u> .  |
| Exit                                      | 5 Follow the instructions in <a href="#">“Starting CallPilot Manager”</a> on page 14 to log on to CallPilot Manager.  |
|   | 6 Use the default password 0000 to log on.<br>Create a new System Administrator password.   |



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## Chapter 3

# CallPilot mailboxes

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## About installing mailboxes

You install mailboxes by enabling a software authorization code. The software authorization code determines the number of mailboxes that you can add to CallPilot. On CallPilot 150 you can have a maximum of 300 mailboxes. On Business Communications Manager 2.5 you can have a maximum of 1,000 mailboxes. Refer to [“Enabling software authorization codes” on page 95](#) for more information on software authorization codes.

## System Administrator Mailbox

The System Administrator Mailbox:

- is reserved for the System Administrator
- is created automatically when the system is initialized for the first time
- is where you can send Broadcast Messages from to all Subscriber mailboxes

Only the System Administrator can access the System Administrator Mailbox. Remember to check this mailbox for messages.



**Warning:** Change the System Administrator password frequently to minimize the risk of unauthorized activity.

---

Default System Administrator Mailbox number and password combinations			
For a mailbox number length of...	the default System Administrator Mailbox number is...	and the default System Administrator Mailbox password is...	so the combined mailbox number and password is...
2	12	0000	120000
3	102	0000	1020000
4	1002	0000	10020000
5	10002	0000	100020000
6	100002	0000	1000020000
7	1000002	0000	10000020000

The default Class of Service for the System Administrator Mailbox is 7. You can change the Class of Service at any time. For information on changing the Class of Service, refer to [“Changing mailbox settings” on page 35](#).

## General Delivery Mailbox

The General Delivery Mailbox is your company mailbox. It is created automatically when the system is initialized for the first time. The General Delivery Mailbox stores messages from callers when the Operator is not available, or from callers who use a rotary dial telephone.

Usually the Receptionist or designated Operator checks for messages in the General Delivery Mailbox.



**Warning:** Change the General Delivery Mailbox password frequently to minimize the risk of unauthorized activity.

Default General Delivery Mailbox number and password combinations			
For a mailbox number length of...	the default System Administrator Mailbox number is...	and the default System Administrator Mailbox password is...	so the combined mailbox number and password is...
2	10	0000	100000
3	100	0000	1000000
4	1000	0000	10000000
5	10000	0000	100000000
6	100000	0000	1000000000
7	1000000	0000	10000000000

The default Class of Service for the General Delivery Mailbox is 1. You can change the Class of Service any time. For information on changing the Class of Service, refer to [“Changing mailbox settings” on page 35](#).

The General Delivery Mailbox can receive messages before it is initialized, but you cannot retrieve messages from the General Delivery Mailbox until you initialize it. For information about initializing mailboxes, refer to [“Initializing a mailbox” on page 27](#).

## Subscriber mailboxes

Create a Subscriber mailbox for each person in your organization who needs to be able to receive messages.

A Subscriber mailbox must be initialized by the mailbox owner before it can receive voice messages. Until a mailbox is initialized, it cannot receive voice messages and any calls that are directed to it are rerouted to the General Delivery Mailbox. Tell subscribers to change their mailbox password as soon as they initialize their mailbox.

## Guest mailboxes

A Guest mailbox is a Subscriber mailbox without a primary extension. Create Guest mailboxes for people who do not have an operating extension but require a mailbox. A Guest mailbox must be initialized by the mailbox owner before it can receive voice messages.

When you create Guest mailboxes, assign mailbox numbers that begin with the same digit. This identifies the mailbox type. Create Guest mailbox numbers that begin with a digit that is different from the Subscriber mailbox numbers. For example, if Subscriber mailbox numbers start with two, Guest mailboxes can start with the number four.

### When to use Guest mailboxes

Guest mailboxes can provide a temporary employee with CallPilot services, give clients access internal messaging and call routing, and let customers leave telephone orders.

You can use Guest mailboxes to:

- take personal catalog shopping orders
- list classes or seminars and let callers register by telephone
- give frequent customers access to CallPilot services

### Using a Guest mailbox for telephone registration

This example shows how to set up a Guest mailbox with announcement and order-taking capabilities. When you provide services that let a customer call into a mailbox, include the mailbox number in the greeting. This lets a caller transfer directly to the mailbox.

To use a Guest mailbox to provide telephone registration, you must first choose a mailbox number. Make sure that the Guest mailbox number is unique and is not assigned to any display telephone extension. Next, record the mailbox greeting.

For example:

*“This month we are pleased to provide the following courses: Jazz Dancing Made Easy, Intermediate Jazz Dancing, Warming Up for that Big Performance, and Beginner Ballet. If you are interested in any of these courses, please leave your name and telephone number after the tone. One of our instructors will contact you with more information.”*

You can include the time and date the classes are being offered. This example is applicable to Guest mailboxes that are used for taking orders.

After you record the announcement, record a Company Greeting that tells callers about the mailbox. For example:

*“Good Morning. This is On Your Toes Dance School. To reach the dance studio, press **4** **6**. To register for our fall classes, press **2** **8**. To reach our receptionist, press **0**.”*



**Note:** The number 46 in this example is an operating telephone extension and the number 28 is the Guest mailbox.

---

Make sure the leading digit of Guest mailbox numbers is different from the leading digit of the extensions. If you must use the same leading digit, ensure the Guest mailbox numbers are “out-of-range” extension numbers. To test if an extension is out-of-range, dial it from another extension. If the number is out-of-range, the display shows `Invalid number`. If the number is not out-of-range, the display shows `Not in service`.

You must assign a Class of Service to the Guest mailbox. When you assign a Class of Service to a Guest mailbox used as an order mailbox, choose a Class of Service that has the maximum mailbox greeting and message time available. Refer to [“Mailbox Class of Service” on page 22](#).

## Information mailboxes

Information mailboxes play an informative message to callers who access it. An Information mailbox must be initialized before it can play an information message. Callers cannot leave messages in Information mailboxes. Information mailboxes do not have operating extensions.

Information mailboxes are maintained by the System Administrator or a mailbox owner.

You can use Information mailboxes to:

- announce sales
- provide product lists
- announce special events

You create the Information mailbox and give it to a subscriber or department. The department creates the password and maintains the greeting. Information mailbox Greetings can be recorded by you or by the person assigned the Information mailbox.

To let callers know about your company’s Information mailboxes:

- Advertise the Automated Attendant main number, and record a Company Greeting that mentions the Information mailbox services.
- Provide a list of your company’s Information mailbox numbers in brochures and telephone directory advertising.
- Mention the Information mailboxes in the Company Greeting if your company has a small number of Information mailboxes, such as three or four. Use Custom Call Routing (CCR) if you have a large number of Information mailboxes.

- Assign the Operator as the transfer point for all Information mailbox inquiries. Record a statement in the Company Greeting that tells callers to press zero to reach company information. For example, “*Good Afternoon. This is On Your Toes Dance Studio. To reach our studio, press 4 6. To listen to one of our special announcements, press 0 to reach the Operator.*” When a caller presses zero, have the Operator provide a list of the Information mailboxes and transfer the caller accordingly.

A call disconnects after the Information mailbox greeting plays except:

- if the call is extended by the Auto Attendant, the call disconnects or returns to the Auto Attendant according to the Return to AA setting of the Greeting Table.
- if the Information mailbox is the Mailbox node of a Custom Call Routing Tree, the call disconnects, or returns to the Home menu, or returns to the previous menu, according to the Next Action setting of the Mailbox node.

The maximum length of the greeting is determined by the Class of Service. The default settings for Class of Service 7 and 8 allow greetings that are up to 10 minutes in length.

If CallPilot is configured as bilingual, the Information mailbox has greetings in primary and alternate languages. The rules for bilingual prompting determine which one of these callers hear. Callers press a dialpad button, depending on which country they are in, to switch to the other greeting.

While they listen to the Information mailbox greeting, callers can use playback commands such as pause, resume, forward and back. Outside callers can press a dialpad button, depending on which country they are in, to transfer to the system attendant extension.



## Class of Service default values

Class of Service	1	2	3	4	5	6	7	8
Prompt language	P	A	P	A	P	A	P	A
Mailbox message time (in minutes)	15	15	15	15	5	5	20	20
Message length (in minutes)	3	3	7	7	3	3	2	2
Message retention period (in days)	30	30	0	0	7	7	15	15
Greeting length (in minutes)	1	1	1	1	1	1	10	10
Off-premise Message Notification	Y	Y	Y	Y	N	N	Y	Y
Retry intervals (in minutes)	5	5	10	10	n/a	n/a	30	30
Number of attempts	3	3	5	5	n/a	n/a	9	9
Outbound Transfer	Y	Y	Y	Y	N	N	Y	Y
Incorrect pswd attempts	9	9	9	9	6	6	4	4
Password expiry (in days)	90	90	90	90	60	60	30	30
Networking*	Y	Y	Y	Y	N	N	Y	Y
Target Attendant	Y	Y	Y	Y	N	N	Y	Y
Call Record	N	N	N	N	N	N	N	N
Mailbox UI	The interface selected from the Installation Wizard as the primary interface.							
Class of Service	9	10	11	12	13	14	15	16
Prompt language	P	A	P	A	P	A	P	A
Mailbox message time (in minutes)	10	10	30	30	120	120	120	120
Message length (in minutes)	3	3	7	7	10	10	2	2
Message retention period (in days)	365	365	60	60	90	90	45	45
Greeting length (in minutes)	1	1	2	2	3	3	5	5
Off-premise Message Notification	Y	Y	N	N	Y	Y	Y	Y
Retry intervals (in minutes)	5	5	n/a	n/a	15	15	30	30
Number of attempts	3	3	n/a	n/a	7	7	9	9
Outbound Transfer	Y	Y	N	N	Y	Y	Y	Y
Incorrect pswd attempts	9	9	9	9	6	6	4	4
Password expiry (in days)	90	90	90	90	60	60	30	30
Networking*	Y	Y	N	N	Y	Y	Y	Y
Target Attendant	Y	Y	N	N	Y	Y	Y	Y
Call Record	N	N	N	N	N	N	N	N
Mailbox UI	The interface selected from the Installation Wizard as the primary interface.							

\* If the Message Networking option is installed. 0 = indefinite; never expire, P = Primary Language, A = Alternate Language

## Mailbox properties

You can change these mailbox properties, which are not included in its Class of Service:

- [Company Directory](#)
- [Message Waiting Notification](#)
- [Outdial type](#)
- [Alternate extensions](#)
- [Express Messaging Line](#)
- [Call Screening](#)

Mailbox properties are not included in a Class of Service. When you add a mailbox, you can change these options without changing the Class of Service.

### Company Directory

The Company Directory is an internal voice list that contains the spoken names of mailbox owners with initialized mailboxes who are assigned to the directory, and the names of other mailboxes that you record a spoken name for, such as Information mailboxes.

When you add a mailbox, you determine whether the mailbox appears in the Company Directory. Even if you do not include a mailbox in the Company Directory the mailbox owner must still record their name when they initialize their mailbox. If the mailbox owner does not record their name in the Company Directory, you can record a spoken name for them by following the procedure “[Changing mailbox settings](#)” on page 35.

### Message Waiting Notification

Message Waiting Notification gives subscribers a visual indication on their telephone display that they have new messages.

The default value for Message Waiting Notification is Yes. Message Waiting Notification displays **Message for you** on a subscriber’s display telephone when they have a message.

When you create Guest Mailboxes, set Message Waiting Notification to No. Guest Mailboxes do not have an operating extension.

### Outdial type

The Outdial type determines which line or line pool the system uses when a mailbox owner wants to use the Reply feature for replying to a message left by an external caller, and when Off-premise Message Notification and Outbound Transfer are used.

The default for Outdial type is None. The values available are None, Line, Pool or Route. Until you assign a line or line pool as the Outdial type for a mailbox, the mailbox owner can use:

- the Reply feature to reply to calls from internal extensions only
- Off-premise Message Notification for internal extensions only
- Outbound Transfer for internal extensions only





The prime set for the Express Messaging Line must be set to the voicemail DN. For more information refer to your system documentation. The Express Messaging default is none. Subscribers must have Fax enabled to receive fax messages on the Express Messaging Line.

## Call Screening

Call Screening lets mailbox owners determine who is calling before they accept a call. Call Screening is useful if there is no Caller ID available. The system records the caller's name, calls the mailbox owner's telephone, announces the name of the caller and offers options such as accepting the call or taking a message.

Call Screening applies to external calls dialed by callers using the extension dialing facilities of the Automated Attendant or Custom Call Routing (CCR). Call Screening does not apply to internal calls, or external calls routed using a CCR Transfer node or placed to a mailbox owner's dedicated line. If a caller is calling from a line for which the mailbox owner has recorded a Personal Mailbox Greeting, Call Screening is bypassed and the call transfers without delay.

If Call Screening is enabled, CallPilot calls a mailbox owner's telephone that is call forwarded.

The default for Call Screening is No, which means that unless subscribers have CLID they cannot determine who is calling before they answer the call.

## Restricting outdialing

You can apply dialing restrictions to Nortel Networks Business Series Terminals and the extensions connected to CallPilot 150 or Business Communications Manager 2.5.

### To restrict outdialing

Do one of the following:

- In system programming, assign dialing restrictions to the extension numbers that CallPilot is connected to. This restricts all outdialing calls including external transfers from CCR trees, Off-premise Message Notification and Outbound Transfers. Outdialing is done by the extension that CallPilot is connected to. For more information refer to your system documentation.
- In system programming, assign dialing restrictions to the extension of the subscriber. For additional information, refer to your system documentation.
- In system programming, assign dialing restrictions to the lines used for outdialing. For additional information, refer to your system documentation.
- In CallPilot Manager, set the Outdial type for the subscriber's mailbox to None. This restricts outdialing calls from the mailbox. See [“Outdial type” on page 24](#) and [“Changing mailbox settings” on page 35](#) for more information.


## Initializing a mailbox


Initializing a mailbox prepares your mailbox to receive messages. A mailbox cannot receive and store messages until it is initialized.


Initializing a mailbox involves:


- choosing a password from four to eight digits long that does not start with zero
- changing the CallPilot default password to the new password
- recording the mailbox owner's name in the Company Directory




### To initialize a mailbox


- 1 Press  9 8 1.
- 2 Log on by following the voice prompts.
- 3 This display appears briefly to indicate that you must change your password.
 

Must change Pswd
- 4 Enter a new password from four to eight digits long that does not start with zero. Press OK or .
 

Pswd:  
RETRY OK
- 5 Reenter your new mailbox password and press OK or .
 

Again:  
RETRY OK
- 6 At the tone, record your name in the Company Directory. Include your mailbox number in the recording, For example, "Pat Smith, mailbox 5813." Press OK or  to end the recording.
 

Record name:  
RETRY OK
- 7 Press OK or  to accept the recording or press PLAY or  to listen to the recording or press RETRY or  to re-record your name.
 

Accept name?  
RETRY PLAY OK
- 8 Press  to end the session.





## Checking which mailbox interface you use

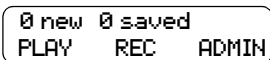
CallPilot supports two interfaces: Norstar Voice Mail and CallPilot. You determine which interface is assigned to mailboxes.

Use this procedure to check which mailbox interface you use, then follow the procedures in the guide that apply to your interface.

Some procedures apply to both interfaces.

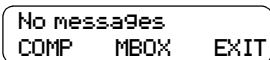
### To check which mailbox interface you use

- 1 Press    .  
Follow the voice prompts or the display button options to open your mailbox.
- 2 Check the display to see which interface you use:




0 new 0 saved  
PLAY REC ADMIN

This is the Norstar Voice Mail interface.



No messages  
COMP MBOX EXIT

This is the CallPilot interface.

- 3 Press  to end the session.

---

## Chapter 4

# Working with mailboxes

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### Adding a Subscriber mailbox

If you want to create multiple Subscriber mailboxes, refer to [“Adding many mailboxes”](#) on page 32 for more information.

#### To add a Subscriber mailbox

- 1 Click the **Mailbox Administration** heading.
- 2 Click the **Add Mailbox** link.  
The Add Mailbox page appears.
- 3 In the **Mailbox** box, type the mailbox number.
- 4 From the **Mailbox Type** list box, select **Subscriber**.
- 5 Click the **Submit** button.  
The Subscriber Mailbox page appears for the mailbox.
- 6 In the **Extension** box, type the extension.
- 7 In the **Last Name** and the **First Name** boxes, type the mailbox owner’s last and first names.
- 8 From the **Class Of Service** list box, select a Class of Service.
- 9 Clear the **Display in Directory** check box if you do not want the mailbox owner’s name to appear in the Company Directory.
- 10 Clear the **Enable Message Waiting** check box if you do not want message notification to appear on the mailbox owner’s telephone display.
- 11 From the **Outdial Type** list box:
  - select **None** if you do not want to assign outdialing capabilities  
or
  - select **Line** and type the line number.  
Line numbers must be between 1 and 500.  
or
  - select **Pool** and type the line pool number or letter.
- 12 In the **Alternate Ext 1** box, type the Alternate extension.  
If you do not require an alternate extension leave this box empty.
- 13 In the **Alternate Ext 2** box, type the second Alternate extension.  
If you do not require a second alternate extension leave this box empty.
- 14 Select the **Enable Call Screening** check box to assign screened transfers to the mailbox owner  
or  
clear the Call Screening check box to assign blind transfers to the mailbox owner.
- 15 If you want to assign an Express Messaging Line to the mailbox, in the **Express Messaging Line** box type the line number.
- 16 Click the **Submit** button.

## Adding a Guest mailbox

Assign all Guest mailboxes numbers that begin with the same digit. This helps you identify the mailbox type.

### To add a Guest mailbox

- 1 Click the **Mailbox Administration** heading.
- 2 Click the **Add Mailbox** link.  
The Add Mailbox screen appears.
- 3 In the **Mailbox** box, type the mailbox number.
- 4 From the **Mailbox Type** list box, select **Subscriber**.
- 5 Click the **Submit** button.  
The Subscriber Mailbox page appears for the mailbox.
- 6 Leave the **Extension** box blank.
- 7 In the **Last Name** box, type the mailbox owner's last name.  
The last name can be a maximum of 15 characters.
- 8 In the **First Name** box, type the mailbox owner's first name.  
The first name can be a maximum of 15 characters.
- 9 From the **Class of Service** list box, select a Class of Service.
- 10 Select the **Display In Directory** check box if you want the mailbox owner's name to appear in the Company Directory.
- 11 From the **Outdial Type** list box select an outdialing type.  
For more information refer to [“Outdial type” on page 24](#).
- 12 Leave the **Alternate Ext 1** check box blank.
- 13 Leave the **Alternate Ext 2** check box blank.
- 14 Ensure the **Enable Call Screening** check box is clear. Guest mailboxes must have blind transfers.
- 15 Ensure the **Enable Message Waiting** check box is clear.
- 16 If you want to assign an Express Messaging Line to the Guest mailbox, type the line number in the **Express Messaging Line** box.
- 17 Click the **Submit** button.

## Adding an Information mailbox

Assign all Information mailboxes numbers that begin with the same digit. This helps you identify the mailbox type.

### To add an Information mailbox

- 1 Click the **Mailbox Administration** heading.
- 2 Click the **Add Mailbox** link.  
The Add Mailbox page appears.
- 3 In the **Mailbox** box, type the mailbox number.
- 4 From the **Mailbox Type** list box, select **Information**.
- 5 Click the **Submit** button.  
The Information mailbox screen appears for the mailbox.
- 6 In the **Last Name** and the **First Name** boxes, type a name for the mailbox. The combined characters for the last name and the first name can be a maximum of 16 characters.
- 7 From the **Class of Service** list box, select a Class of Service.  
Assign a Class of Service that has the maximum message length. To accommodate an average Information mailbox recorded message assign a Class of Service of either 7 or 8. These Classes of Service have a greeting length of 10 minutes.
- 8 Select the **Display in Directory** check box if you want the mailbox owner's name to appear in the Company Directory.
- 9 Click the **Submit** button.

## Adding many mailboxes

You can save time by creating multiple mailboxes when you set up CallPilot for the first time, or when you need to add a large number of mailboxes to your system. Adding many mailboxes creates Subscriber mailboxes for the range of extensions that you define. You must use extensions that are not already assigned to mailboxes.

To make the most effective use of adding multiple mailboxes, identify people who need a non-standard Subscriber mailbox. Create these mailboxes individually. Use Add Many Mailboxes to add the remaining mailboxes.

The mailboxes you create using Add Many Mailboxes have these characteristics:

- The mailbox number is the same as the extension number.
- The mailboxes have the same settings for Class of Service, Call Screening, Message Waiting, Outdialing and Display in Directory.
- The mailbox name is taken from the extension names assigned on your system. If extension names are not programmed, the mailbox number is used.
- The mailboxes created are uninitialized and ready for initialization by mailbox owners.

A mailbox is not created if:

- a mailbox with the same number already exists
- the extension is used by another mailbox
- the extension is identified as a CallPilot voice port
- there is no phone associated with the extension connected to the system. You must have a phone connected to the system for each mailbox you create

## To add multiple mailboxes

- 1 Click the **Mailbox Administration** heading.
- 2 Click the **Add Many Mailboxes** link.  
The Add Many Mailboxes screen appears.
- 3 In the **From Extension** box, type the extension you want to start creating mailboxes from.
- 4 In the **To Extension** box, type the extension you want to stop creating mailboxes at.
- 5 From the **Class Of Service** list box, select a Class of Service.
- 6 Select the **Display in Directory** check box if you want the mailbox owner's name to appear in the Company Directory.
- 7 Select the **Enable Message Waiting** check box if you want Message Notification to appear on the mailbox owner's telephone display.



- 8 From the **Outdial Type** list box, select **Line** and type the specific outgoing line you want to assign for outdialing  
or  
click **Pool** and type the Line Pool number or letter you want to assign for outdialing  
or  
click **Route** to assign a route code for outdialing  
or  
click **None** if you do not want to assign outdialing capabilities.
- 9 Select the **Enable Call Screening** check box to assign screened transfers to the mailbox owner, or clear the Call Screening check box to assign blind transfers to the mailbox owner.
- 10 Click the **Submit** button.

## About mailbox passwords

Each mailbox is protected by a password established by the mailbox owner. When you add a mailbox to CallPilot Manager, the password 0000 is assigned. This is the default password.

To use a mailbox, a mailbox owner must change the default password. The new password must be four to eight digits in length and cannot start with a zero.

If a mailbox owner cannot remember the password, you can reset the password to the default password 0000. Refer to [“To reset a mailbox password” on page 35](#).



**Note:** Change the System Administrator password frequently to minimize the risk of unauthorized activity.

---

### Incorrect password lock-out

In its Class of Service each mailbox is assigned a maximum number of incorrect password attempts. CallPilot records the number of incorrect attempts from the last time the mailbox was accessed successfully. If the number is exceeded, the mailbox owner is “locked-out”. The mailbox cannot be opened until the password is reset. Refer to [“To reset a mailbox password” on page 35](#).

### Password expiry

In its Class of Service each mailbox is assigned the maximum number of days a password remains active. If the maximum number of days is exceeded, the mailbox password expires. The mailbox owner can open the mailbox, but cannot access messages or perform other mailbox functions until they change the password. Unless the telephone has a two-line display, this announcement plays when the mailbox is opened after the password expires:

*“Your current password has expired. You must change your password.  
Please enter your new password and press .*”

After the new password is entered the mailbox returns to normal operation.



**Note:** Set the Class of Service for password expiry to a low value so that mailbox owners must change their password frequently. Mailboxes with a Class of Service with a high or indefinite password expiry interval setting have an increased likelihood of unauthorized use of the CallPilot or Business Communications Manager 2.5 system.

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## Changing mailbox settings

After you add a mailbox, you can:

- reset the mailbox password
- change the mailbox properties
- edit a Class of Service

### To reset a mailbox password

- 1 Click the **Mailbox Admin** heading.  
The Mailbox List page appears.
- 2 Click the **Reset Password** link for the mailbox you want to reset the password for.  
A message appears that asks you to confirm your request to change the password.
- 3 Click the **OK** button.



**Note:** Reset a password only if the mailbox owner forgets it or is “locked-out”. The password for the reset mailbox is 0000. Mailbox owners cannot access their messages until they change the default password. After you reset a mailbox password, tell the mailbox owner to change the default password as soon as possible. While the mailbox has the default password, the mailbox is vulnerable to unauthorized access.

---

### To change mailbox properties

- 1 Click the **Mailbox Admin** heading.  
The Mailbox List page appears.
- 2 Click the **Change** link of the mailbox you want to modify.  
The page appears for the mailbox you select.
- 3 Modify the properties you want to change.  
For more information on mailbox properties, refer to [“Mailbox properties” on page 24](#).
- 4 Click the **Submit** button.

## Editing a Class of Service

For information on the Class of Service settings, refer to [“Mailbox Class of Service” on page 22](#).

### To edit a Class of Service

- 1 Click the **Mailbox Administration** heading.
- 2 Click the **Class of Service** link.  
The Class of Service page appears.
- 3 Click the **Change** link for the Class of Service you want to change.  
The Class of Service page appears for the Class of Service you select.
- 4 If you want to change the name, in the **Name** box type the new name.
- 5 If you want to change the maximum mailbox message time, in the **Max Mailbox Msg Time** box type a value from 1 - 180 minutes.
- 6 If you want to change the maximum message length, in the **Max Message Length** box type a value from 1 - 60 minutes.
- 7 If you want to change the message retention period, in the **Message Retention Period** box type a value from 1 - 365 days, or type 0 if you do not want messages to be purged.
- 8 If you want to change the maximum greeting length, in the **Max Greeting Length** box type a value from 1 - 30 minutes.
- 9 If you want change the Off-premise Message Notification setting, select or clear the **Enable Off-premise Msg Notification** check box.
- 10 If you want to change the amount of time between retry intervals for message delivery, in the **Retry Intervals** box type a value from 1 - 120 minutes.
- 11 If you want to change the maximum number of attempts for message delivery, in the **Max Number of Attempts** box type a value from 1 - 20.
- 12 If you want to change the Outbound Transfer setting, select or clear the **Enable Outbound Transfer** check box.
- 13 If you want to change the maximum number of incorrect password attempts, in the **Max Incorrect Password Attempts** box type a value from 4 - 20.
- 14 If you want to change the password expiry setting, in the **Password Expiry** box type a value from 1- 365 days, or type 0 if you do not want the password to expire.
- 15 If you want to change the networking setting, select or clear the **Enable Networking** check box. This check box appears only if the Message Networking option is installed.
- 16 If you want to change the personal attendant setting, select or clear the **Enable Personal Attendant** check box.
- 17 If you want to change the record call setting, select or clear the **Enable Record Call** check box.
- 18 If you want to change the prompt language, select a language from the **Prompt Language** list box.

- 19 If you want to change the user interface and you use a Norstar phone system, select a user interface from the **User Interface** list box.
- 20 Click the **Submit** button.

## Deleting a mailbox

Before you delete a mailbox, ensure the mailbox owner has listened to all their messages. When a mailbox is deleted, all messages stored in that mailbox are deleted and the mailbox is deleted automatically from the Company Directory and all Group Lists.

If you are deleting a mailbox associated with a CCR Tree, make sure you remove the mailbox from the CCR Tree first. If you do not delete the mailbox, the message `Mbox in CCR` appears on your display.

You cannot delete a mailbox if:

- it is currently in use
- it is a target in the CLID table or a CCR Tree
- it is used as a skillset mailbox
- it is the System Administrator or the General Delivery Mailbox

### To delete a mailbox

- 1 Click the **Mailbox Administration** heading.  
The Mailbox List page appears.
- 2 Click the **Delete** link for the mailbox you want to delete.  
A message appears that asks you to confirm the deletion.
- 3 Click the **OK** button.

## About Group Lists

With Group Lists you can send messages to multiple recipients. You can create a maximum of 99 Group Lists on your system. Each Group List can contain a maximum of 300 mailboxes. Before you add Group Lists, prepare a group mailbox member list. This list must contain:

- the Group List name – maximum 16 characters long
- the mailbox numbers to include in the group

After you create a Group List, you can change the mailboxes included in the list, record a new list name, view the Group List, or delete the Group List.

## About Group List Numbers

During system installation, a number from 0 to 9 (default 9) is assigned as the Group List leading digit. For example, the default Group List numbers are 901 to 999. If the leading digit is 5, the Group List numbers are 501 to 599. Group List numbers are three digits long.

You can change the Group List leading digit. For more information on changing the Group List leading digit, refer to [“Setting the system properties” on page 87](#).

The Group List number acts like a mailbox number when you leave a message for the mailboxes in the Group List. The table below shows two sample Group Lists.

This table shows an example of a Group List

Group List number	Name	Mailbox number
901	Sales	224
		223
		233
902	Shipping	227
		221

## Adding a Group List

A mailbox must be initialized before you can add it to a Group List. For how to initialize a mailbox, refer to [“Initializing a mailbox” on page 27](#).

### To add a Group List

- 1** Click the **Mailbox Administration** heading.
- 2** Click the **Group Lists** link.  
The Group Lists page appears.
- 3** If the Fax option is installed, select either **Fax** or **Voice** as the type of Group List you are adding. Fax is not available on CallPilot 150.
- 4** Click the **Add** button.  
The Group List Properties page appears.
- 5** Click the **Voice** button and follow the steps in [“Recording greetings and prompts” on page 41](#) to record a spoken Group List name from your computer  
or  
follow the steps in [“Importing a greeting or prompt” on page 43](#) to select a previously recorded Group List name.
- 6** In the **Display Name** box, type the new Group List name.
- 7** Click the **Submit** button.  
The Group Lists page appears with the new Group List added.
- 8** Click the **Members** link.  
The Members List page appears.
- 9** Click the **Add** button.  
The Add Members page appears.
- 10** Select each mailbox that you want to add to the Group List.
- 11** Click the **Submit** button.  
The Members List page appears, showing the mailboxes you selected.
- 12** Click the **Close** button.

## Changing a Group List

You can change a Group List name and members at any time. You cannot change a Group List number. To change a Group List number, you must delete the Group List and add new member mailbox numbers as a new Group List. For more information, refer to [“Adding a Group List” on page 39](#).

### To change a Group List

- 1 Click the **Mailbox Administration** heading.
- 2 Click the **Group Lists** link.  
The Group Lists page appears.
- 3 If you want to change the Group List recording:
  - Click the **Change** link
  - Follow the steps in [“Recording greetings and prompts” on page 41](#)
- 4 If you want to change the Group List display name:
  - Click the **Change** link
  - In the **Display Name** box type the new Group List name
- 5 If you want to change the Group List members:
  - Click the **Members** link.
  - Click the **Add** button.
  - Select the members you want to add.
  - Click the **Submit** button.
  - Click the **Close** button.



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## Chapter 5

# Recording greetings and prompts

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## Recording greetings and prompts

With CallPilot Manager you can:

- record and listen to greetings and prompts from a telephone handset
- export greetings and prompts (available on Business Communications Manager 2.5 only)
- use computer files as greetings or prompts (available on Business Communications Manager 2.5 only)

With CallPilot Manager you can record and import:

- Automated Attendant prompts and greetings.  
See [“Recording a Company Greeting” on page 48](#) and [“Recording a Custom Menu” on page 51](#)
- Group List names.  
See [“Adding a Group List” on page 39](#)
- CCR prompts and greetings.  
See [“Creating a Home node” on page 65](#)  
[“Adding nodes to the Home node” on page 69](#) and  
[“Adding an Information mailbox” on page 31](#)

### To record a greeting or prompt

For best results, use a telephone that is attached to the same switch as your voicemail system. Avoid using wireless telephones.

- 1 Click the **Voice** link.  
The page you can record greetings and prompts from appears.
- 2 In the **Connect to** box, type the extension number or telephone number you are using to record the greeting or prompt.  
For a local extension, just type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voicemail system. For example, you might need to dial 9, the area code, and then the telephone number.
- 3 Click the **Record** button.  
The telephone rings.
- 4 Pick up the handset. Do not use Handsfree. After the tone, record your greeting or prompt.
- 5 After you finish recording, click the **Stop** button.

- 6 To listen to the prompt, click the **Play** button  
or  
to save the recording, click the **Save** button.  
The recording replaces the original prompt or greeting.
- 7 Click the **Close** button and replace the telephone handset.

You can disconnect the telephone by clicking the Hang Up button or replacing the telephone handset. The next time you use Play or Record, the phone number shown in the Connect to box is dialed. You do not need to hang up each time. The connection remains for several minutes, even if you close the window. You can access another greeting or prompt without having to re-answer your telephone. The connection disconnects after several minutes of inactivity, or if you log off CallPilot Manager.

## Importing a greeting or prompt

If you use Business Communications Manager 2.5, you can import a previously recorded greeting or prompt. You cannot import a previously recorded greeting or prompt if you use CallPilot 150.

### To import a previously recorded greeting or prompt

- 1 Click the **Voice** link.
- 2 If you know the location of the greeting or prompt, in the **Import** box type the location of the file and click the **Send** button  
or  
if you do not know the location of the greeting or prompt, at the **Import** option click the **Browse** button and follow steps 3 to 6.  
The Open dialog box appears.
- 3 From the **Look in** list, select the location of the file.
- 4 In the **File name** box, type the file name.
- 5 From the **Files of type** list, select the file type.
- 6 Click the **Open** button.
- 7 Click the **Send** button.
- 8 To play the greeting or prompt, in the **Connect to** box type an extension or telephone number and click the **Play** button.  
Your telephone rings.
- 9 Answer the phone to listen to the greeting or prompt.
- 10 Click the **Save** button to save the greeting or prompt.  
The greeting or prompt that you save replaces the original prompt or greeting.
- 11 Click the **Close** button and replace the telephone handset.

## Exporting a greeting or prompt

If you use Business Communications Manager 2.5, you can export a previously recorded greeting or prompt to a computer file in WAV or in its native format. You cannot export a previously recorded greeting or prompt if you use CallPilot 150.

Export the greeting or prompt in its native format if you want to re-import the file later. You can re-import the file to your system or another voicemail system. Export the file in its native format if you want to use the same company greetings or Auto Attendant prompts at different company locations. If you keep the file in its native format, you avoid converting the file to another format, which can lessen its sound quality.

Export the greeting or prompt in WAV format if you want to edit the sound file on your computer.

### To export a previously recorded greeting or prompt

- 1 Click the **Voice** link.
- 2 At the **Export** option click either the **Native Encoding** or **WAV Encoding** link.  
The File Download dialog box appears.
- 3 Click **Save this file to disk** and click the **OK** button.  
The Save As dialog box appears.
- 4 From the **Save in** list box, navigate to where you want to save the file and click the **Save** button.

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## Chapter 6

# Setting up the Automated Attendant

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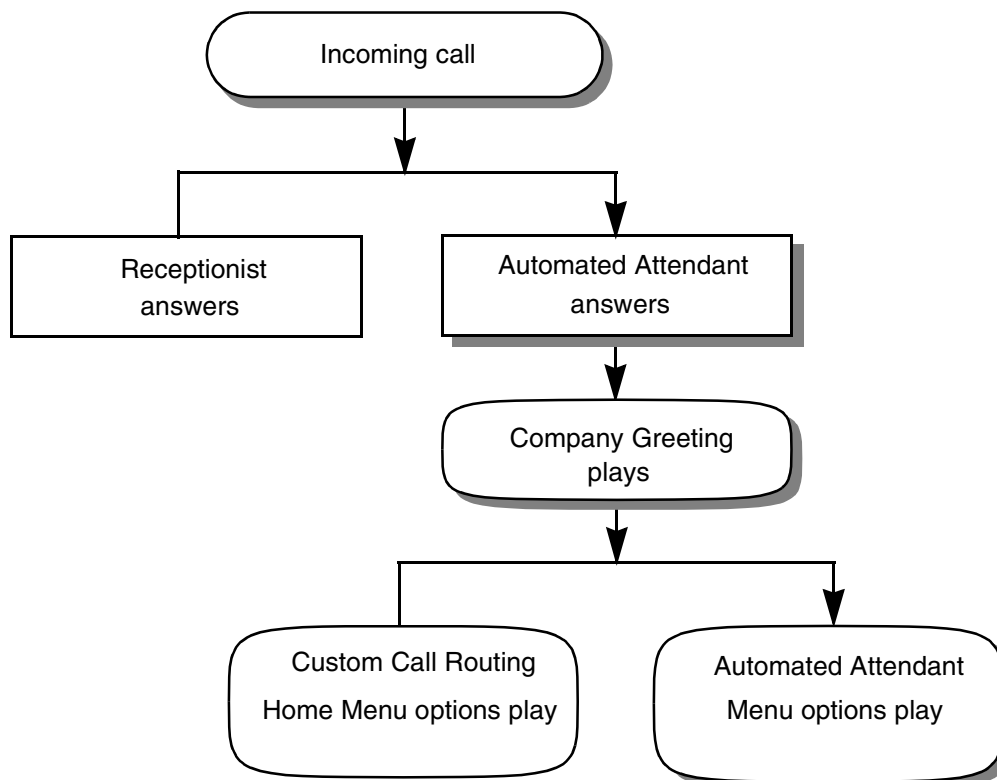
### About the Automated Attendant

The Automated Attendant answers your company's incoming telephone lines with a prerecorded greeting selected from the Greeting Table, according to the time of day.

You can record and assign different greetings to the Greeting Table. You can specify which greetings play for particular lines. For example, you can program the system so that callers hear one greeting when they call the sales line, and a different greeting when they call the customer support line. The Greeting Table parameters control the Auto Attendant. Greeting Table parameters include custom prompts, and whether outside callers hear the Auto Attendant menu or a Custom Call Routing menu.

After the greeting, the Automated Attendant Menu offers callers a range of options that they can select using the dialpad of their telephone. If you want to offer a greater range of options and services for incoming calls, you can assign a Custom Call Routing (CCR) menu to play instead of the Automated Attendant Menu. See [“Planning a CCR Tree” on page 61](#) for information on creating a CCR menu.

#### Automated Attendant answering overview



## Greeting Tables

Greeting Tables store the recordings played by the Automated Attendant to incoming callers. CallPilot has four Greeting Tables.

You can store a total of 40 Company Greetings, but only four greetings can be assigned to a Greeting Table at any one time. You can assign the same four greetings to each table, or you can assign unique greetings for each table.

This table shows an example of how you can assign Greetings.

Greeting Type	Table 1	Table 2	Table 3	Table 4
Morning	Greeting 1	Greeting 5	Greeting 9	Greeting 13
Afternoon	Greeting 2	Greeting 6	Greeting 10	Greeting 14
Evening	Greeting 3	Greeting 7	Greeting 11	Greeting 15
Non-business	Greeting 4	Greeting 8	Greeting 12	Greeting 16
Morning	Greeting 17	Greeting 21	Greeting 25	Greeting 29
Afternoon	Greeting 18	Greeting 22	Greeting 26	Greeting 30
Evening	Greeting 19	Greeting 23	Greeting 27	Greeting 31
Non-business	Greeting 20	Greeting 24	Greeting 28	Greeting 32

We recommend using greetings 1 through 16 as your daily business greetings, and greetings 17 through 40 as special greetings.

Each Greeting Table is divided into four times of day.

This table shows the default times of day.

Greeting Type	Default start times
Morning	12:00 midnight
Afternoon	12:00 noon
Evening	6:00 pm
Non-business	6:00 pm If default hours are used, the Evening Greeting is not played. You can turn the Non-business Greeting on and off using the Business Status feature. For information about setting the Business Status refer to <a href="#">“Setting the Business Status” on page 106</a> .

### Greeting Tables using the alternate language

If you use primary and alternate languages, we recommend that you assign one Greeting Table to the alternate language. For example, if your company has two incoming lines and you want to have one line assigned to the alternate language, assign the line to the Greeting Table that has greetings recorded in the alternate language. You can record greetings 5, 6, 7 and 8 in the alternate language and assign the greetings to Greeting Table 2 for line 2.

## About Company Greetings

Before you record your Company Greetings, decide what type of greetings you want to use for the incoming telephone lines, and what you want the greetings to say. There are four greeting times that reflect the Morning, Afternoon, Evening and Non-business hours. You can prepare four greetings, or you can use the same greeting for each time of day. As you record the greetings, number them from 1 to 4.

An example greeting for each time of day:

- 1 Morning Greeting: *“Good morning. You have reached Touchstone Marketing.”*
- 2 Afternoon Greeting: *“Good afternoon. You have reached Touchstone Marketing.”*
- 3 Evening Greeting: *“Good evening. You have reached Touchstone Marketing.”*
- 4 Non-business Greeting: *“You have reached Touchstone Marketing. Our business hours are Monday to Friday from 8:00 a.m. to 5:00 p.m. Please stay on the line and leave a message. Thank you for calling.”*

Greetings 1 through 4 are assigned by default to all Greeting Tables. This means that Greeting 1 plays as the Morning Greeting for Greeting Table 1, 2, 3 and 4.

If you use only one Greeting Table, the numbered greetings you record from 1 to 4 play automatically. You do not have to assign Greetings 1 to 4 to the table, but you must select the language preference.

If you use a Primary and Alternate Language, record the option  instruction in the Alternate Language. For example, if you use English as your Primary Language and French as your Alternate Language, your main greeting can be in English and the option  instruction can be in French. For example:

*“Good morning. This is Touchstone Marketing. To use our voice messaging service in French, please press .*”

Since the default Automated Attendant Menu prompt does not announce an Alternate Language option, in your greeting you must tell callers to press  to use the Alternate Language.

Company Greetings can be 0 to 10 minutes in duration. If you need to change the greeting duration, you must change the Class of Service assigned to the System Administrator Mailbox. For information on how to change the setting, refer to [“Changing mailbox settings” on page 35](#).

After you decide what you want your greetings to say, practice recording them. Remember to speak slowly and clearly at a speed that is easy to understand.

## Recording a Company Greeting

### To record a Company Greeting

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Company Greetings** link.  
The Company Greetings screen appears.
- 3 Click the **Voice** link for the greeting you want to record  
and  
follow the steps in [“Recording greetings and prompts” on page 41](#) to record a greeting from your computer  
or  
follow the steps in [“Importing a greeting or prompt” on page 43](#) to select a previously recorded greeting.

## Setting up a Greeting Table

To set up a Greeting Table, complete the following procedures to:

- assign a greeting to a Greeting Table
- assign a CCR Tree to a Greeting Table
- set the business hours
- assign a language preference
- assign a Greeting Table Attendant
- record Custom Menu prompts if you want to replace the default Auto Attendant Menu



**Note:** You must build a CCR Tree before you can assign it. For more information, refer to [“Planning a CCR Tree” on page 61](#).

---



## Assigning greetings to Greeting Tables

For each Greeting Table you can assign what greeting plays and what CCR Tree calls route to, depending on the time of day. You do not have to assign a CCR Tree to a Greeting Table, but if you want to assign a CCR Tree to a Greeting Table you must build it first.

If you do not assign a CCR Tree to a Greeting Table, the caller hears the greeting you assign, then hears the Automated Attendant menu prompt. If you assign a greeting and a CCR Tree to a Greeting Table, the caller hears the greeting you assign and then is routed to a CCR Tree.

### To assign greetings to a Greeting Table

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Greeting Tables** link.  
The Greeting Tables page appears.
- 3 Click the **Change** link for the Greeting Table you want to change.  
The Greeting Table Setup page appears.
- 4 From the **Morning, Afternoon, Evening** and **Non-business** list boxes, select the greeting numbers you want to use.
- 5 From the **CCR Tree** list boxes, select the CCR Tree you want calls to route to for each time of day. If you do not want calls to route to a CCR Tree, select **None**.

## Setting the business hours

Setting the Business Hours determines when each greeting is played on the Greeting Tables. Business Hours are divided into Morning, Afternoon, Evening, and Non-business hours for each of the seven days of the week for each Greeting Table.

### To set the business hours

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Greeting Tables** link.  
The Greeting Tables page appears.
- 3 Click the **Change** link for the Greeting Table you want to change.  
The Greeting Table Setup page appears.
- 4 For the day of the week you want to configure, type a start time in the **Morning, Afternoon, Evening** and **Non-business** boxes.
- 5 Click the **Submit** button.

For days that your business is not open, set all the start times to 12:00 a.m. (midnight). The Non-business greeting plays throughout the day. You can turn the Non-business greeting on and off using the Business Status feature. If the Business Status is Off, the Non-business greeting plays until the Business Status is On. For information on the Business Open setting, see [“Changing the Business Open setting” on page 101](#).

## Assigning a Greeting Table Attendant

The Greeting Table Attendant overrides the designated Operator. If the Attendant does not answer, the call goes to the Attendant extension. If you do not specify an Attendant extension, the call goes to the General Delivery Mailbox.

### To assign a Greeting Table Attendant

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Greeting Tables** link.  
The Greeting Tables page appears.
- 3 Click the **Change** link for the Greeting Table you want to assign the Greeting Table Attendant to.  
The Greeting Table Setup page appears.
- 4 In the **Attendant Extension** box, type the extension of the Greeting Table Attendant.
- 5 Click the **Submit** button.

## Assigning the language preference

After you assign greetings to the Greeting Table, assign the language preference. You can change the language preference any time. You can set the language preference for each Greeting Table. This setting determines which language the Automated Attendant uses when answering incoming calls. If the CallPilot Bilingual Option is set to No, do not assign a language preference.

### To assign a language preference

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Greeting Tables** link.  
The Greeting Tables page appears.
- 3 Click the **Change** link for the Greeting Table you want to change.  
The Greeting Table Setup page appears.
- 4 From the **Language Preference** list box, select **Primary** to use the Primary Language or select **Alternate** to use the Alternate Language.
- 5 Click the **Submit** button.

## Automated Attendant Menu

The Automated Attendant Menu plays after the Company Greeting, and when a mailbox owner accesses the Automated Attendant.

The default Automated Attendant Menu prompt is: *“Using the dialpad, please enter the extension you wish to call. To use the directory, press  . To leave a message, press  . To reach an Operator, press  .”*

## Recording a Custom Menu

If the Automated Attendant Menu prompt is set to No, you must record a Custom Menu prompt to replace the prerecorded one. You can record a prompt from your computer or your telephone handset, or you can select a previously recorded prompt.

With a Custom Menu prompt you can provide callers with a list of options such as choosing the Alternate Language, accessing the Company Directory or reaching an Operator. Each Greeting Table has two Custom Menu prompts: one for a Primary prompt and one for an Alternate prompt.



**Note:** We recommend that you record prompts that are at least eight seconds long.

---

### To record a Custom Menu prompt

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Greeting Tables** link.  
The Greeting Tables page appears.
- 3 Click the **Change** link for the Greeting Table you want to change.  
The Greeting Table Setup page appears.
- 4 At the **Custom Automated Attendant Menu Prompts** option, select the **Enable** check box.
- 5 To record the primary and the alternate prompts, click the **Voice** button and follow the steps in [“Recording greetings and prompts” on page 41](#) to record a greeting  
or  
follow the steps in [“Importing a greeting or prompt” on page 43](#) to select a previously recorded greeting.

## Configuring line answering

The system can answer all your incoming lines, or just the lines you specify. Before the system can answer an incoming line, you must assign the line and set the Answer status to Yes. Each line you configure is answered by Greeting Table 1 unless you specify another table.

You can assign the system to answer incoming calls after a specified number of rings. The number of rings ranges from 0 to 12. If you leave the number of rings at zero, the system answers immediately.

For lines equipped with Calling Line Identification (CLID), you must assign the number of rings to two or more. CLID is not provided until just prior to the second ring, so assigning the number of rings to 0 or 1 prevents CLID from being relayed. Without CLID, personalized greetings, CLID Routing Table and other features related to CLID do not work.

For more information about line answering, refer to [“Changing the Answer Lines Status”](#) on page 102.

### To configure answering for one line

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Lines Administration** link.  
The Lines Administration page appears.
- 3 Click the **Change** link for the Line you want to change.  
The Line Properties page appears.
- 4 From the **Answer Mode** list box, select **Auto Attendant**.
- 5 In the **Table/Queue Number** box, type the Greeting Table number you want to assign to the line selected.
- 6 In the **Number of Rings** box, select the number of rings before CallPilot answers.
- 7 Click the **Submit** button.

### To configure answering for several lines

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Change Many Lines** link.  
The Change Many Lines page appears.
- 3 In the **From** and the **To** boxes, type the range of lines you want to configure answering for.
- 4 From the **Answer Mode** list box, select **Auto-Attendant**, **Call Center** or **None**.
- 5 In the **Table/Queue Number** box, type the Greeting Table number you want to assign to the lines.
- 6 In the **Number of Rings** box, select the number of rings before the system answers.
- 7 Click the **Submit** button.

## Setting the Automated Attendant properties

The Auto Attendant properties control system-wide Auto Attendant properties.

### To set the Auto Attendant properties

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **General Properties** link.  
The Auto-Attendant Properties page appears.
- 3 Set the properties that apply to all Greeting Tables:

<b>Return to Auto-Attendant</b>	<p>Determines what happens after a caller listens to an Information mailbox or leaves a message.</p> <p>If you select the Return to AA check box, the caller returns to the main Auto Attendant prompt and can make another selection. If you do not select Return to AA, the caller disconnects after completing the action.</p>
<b>Touchtone Gate</b>	<p>Determines whether Touchtone Gate is used and whether a Standard or Custom greeting is used. For information about Touchtone Gate refer to <a href="#">“About Touchtone Gate” on page 54</a>.</p> <p><b>None:</b> Disables Touchtone Gate and sends callers from the Company Greeting to the Auto Attendant or the CCR Tree set in the Greeting Table.</p> <p><b>Standard:</b> After they hear the Company Greeting, callers must press an indicated key if they have tone capability. Callers transfer to the Auto Attendant or Custom Call Routing Tree specified by the Greeting Table. If they do not respond, callers go to the system attendant. If there is no system attendant, callers go to the General Delivery Mailbox. If the General Delivery Mailbox is disabled the call disconnects.</p> <p><b>Greeting 1 - 40:</b> Uses a custom greeting instead of the standard greeting. Select a Company Greeting that is not used in any Greeting Table. We suggest Greeting 40 as the default.</p> <p>Set Touchtone Gate to None if most callers have tone capability. Use Standard or Custom only in areas where most callers do not have tone capability.</p>

- 4 Click the **Submit** button.

## About Touchtone Gate

With Touchtone Gate incoming calls can be routed more quickly.

With Touchtone Gate you can have the standard voice prompt play or you can record your own custom prompt. If you choose the standard prompt, the following prompt plays after your Company Greeting: *“If you are calling from a tone dial telephone, please press  now. If you are a pulse dialing caller or if you are calling from a rotary dial phone, please hold and you will be transferred.”*



**Note:** If you want to use a custom prompt, you must record it before you enable Touchtone Gate. It is recommended that you use Greeting 40 as the custom Touchtone Gate prompt. When Touchtone Gate is enabled, Greeting 40 is the default custom prompt. For more information on recording Greetings, refer to [“Recording a Company Greeting” on page 48](#).

---

When the tone for 1 is received, the call goes to the Automated Attendant or CCR Tree. If no tone is received, the call is sent back to the receptionist or designated Operator specified by the Greeting Table. If the attendant is not available, the call is directed to the General Delivery Mailbox. If the General Delivery Mailbox is not available, the call is disconnected.

The Touchtone Gate voice prompt is not played to internal callers or callers using Feature 981 or Feature 986.

If you disable Touchtone Gate, re-record the Company Greeting to include *“If you are calling from a tone dial telephone, please dial the extension number or press  for the company directory. If not, please hold and you will be transferred to the operator.”*

## About the CLID Routing Table

Set up a CLID Routing Table to control how calls are routed based on their Caller Identification. The CLID Routing Table routes recognized incoming telephone numbers to the appropriate destinations. You can set up the CLID Routing Table to direct frequent callers to a specific extension or mailbox, CCR Tree or Greeting Table. To use a CLID Table, your incoming lines must be equipped with Caller Identification service.

If an incoming call has a CLID value that matches an entry in the CLID Routing Table, the call is directed according to the CLID Routing Table rather than the Greeting Table. After the call is directed, the call disconnects or returns to the routing according to the Return to Auto-Attendant setting. For more information about the Return to Auto-Attendant setting, refer to [“Setting the Automated Attendant properties”](#) on page 53.

You can record your CLID Routing Table entries in the table CLID Routing Table section of the *CallPilot Programming Record*.

Telephone numbers in the CLID Routing Table are sorted in numerical order, from the longest number to the shortest. For example:

Destination number	Table entry	Incoming call example
1	313	Incoming number 3148888 does not match any destination.
2	416598	Incoming number 4165981111 matches destination 2.
3	416	Incoming number 4169998888 matches destination 3.
4	5198853895	Incoming number 5198853895 matches destination 4.
5	519	Incoming number 5198853896 matches destination 5.

For the CLID Routing Table to work, your company must:

- subscribe to CLID services from your local telephone company
- have the appropriate hardware for your systems (for example, a CI Trunk cartridge)

## Setting up a CLID Routing Table

Setting up a CLID Routing Table involves:

- entering a telephone number
- assigning a destination such as a Greeting Table, mailbox, extension, or a CCR Tree or node



**Note:** For more information on assigning a CCR Tree destination refer to [“Making a CCR Tree a destination in the CLID Routing Table” on page 73.](#)

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### To add a telephone number to the CLID Routing Table

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **CLID Routing Table** link.  
The CLID Routing Table page appears.
- 3 Click the **Add** button.  
The CLID Setup page appears.
- 4 In the **Calling Line ID** box type the telephone number you want to add.
- 5 At the **Transfer To** option, assign how you want the telephone number to transfer. If you want calls from this number to transfer to:
  - a Greeting Table, select the **Greeting Table** option and from the list box select a Greeting Table number
  - an extension, select the **Extension** option and in the box type the destination extension number
  - a mailbox, select the **Mailbox** option and in the box type the destination mailbox number
  - a CCR Tree, select the **CCR Tree** option, from the list box select the CCR Tree number. You can leave the Path box empty to route the caller to the Home node of the Tree. To route the caller to a specific node of a Tree, in the **Path** box type the sequence of digits the caller presses to go from the Home menu to the target node.
- 6 Click the **Submit** button.



## Editing telephone numbers in the CLID Routing Table

### To change a telephone number in the CLID Routing Table

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **CLID Routing Table** link.  
The CLID Routing Table page appears.
- 3 Click the **Change** link for the entry you want to change.  
The CLID Setup page appears with the telephone number in the Calling Line ID box.
- 4 Edit the entry by changing the telephone number in the **Calling Line ID** box or by changing the transfer options for the number.
- 5 If you want to change the transfer option for the telephone number, at the **Transfer To** option assign how you want the telephone number to transfer. If you want calls from this number to transfer to:
  - a Greeting Table, select the **Greeting Table** option and from the list box select a Greeting Table number
  - an extension, select the **Extension** option and in the box type the destination extension number
  - a mailbox, select the **Mailbox** option and in the box type the destination mailbox number
  - a CCR Tree, select the **CCR Tree** option, from the list box select the CCR Tree number, and in the Path box type the path the caller must follow.
- 6 Click the **Submit** button.

### To delete a telephone number from the CLID Routing Table

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **CLID Routing Table** link.  
The CLID Routing Table page appears.
- 3 Click the **Delete** link for the entry you want to delete.  
A message appears that asks you to confirm the deletion.
- 4 Click the **OK** button.



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## Chapter 7

# Custom Call Routing

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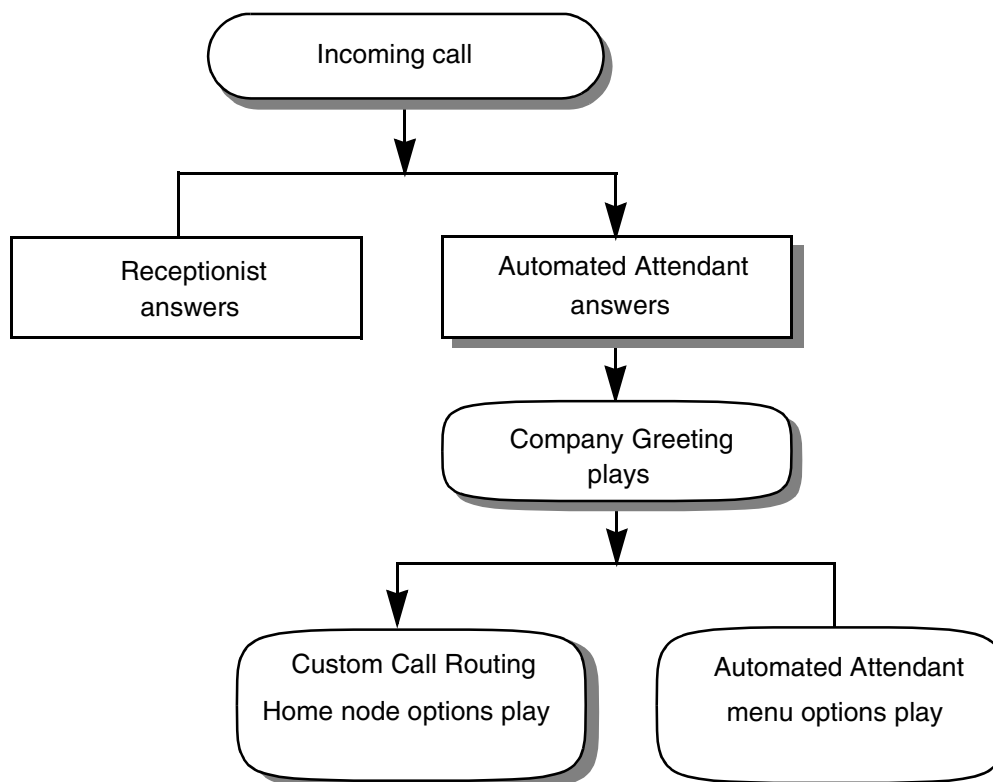
### About Custom Call Routing

With Custom Call Routing (CCR) you can replace Automated Attendant menus with a CCR Tree that offers callers more choices. Callers who reach a CCR Tree hear the CCR Home node immediately after the Company Greeting.

CCR Trees contain paths that callers navigate using their telephone dialpad. By selecting an option from the prompts callers can:

- hear an Information Message
- leave a message in a mailbox
- transfer to an extension or an external number
- go to a sub-menu

#### Custom Call Routing overview



To build a CCR Tree you start by creating the options presented in the Home node. You can include up to eight options in the Home node. You record a prompt that informs callers of the Home node options. You can have up to eight CCR Trees on your system. After you build a CCR Tree you must assign it to a Greeting Table.

The Greeting Table specifies which CCR Tree plays to callers. After callers hear the Company Greeting and the optional Touchtone Gate, they hear the Home node of the CCR Tree instead of the Auto Attendant menu.

The Home node for a CCR Tree can be:

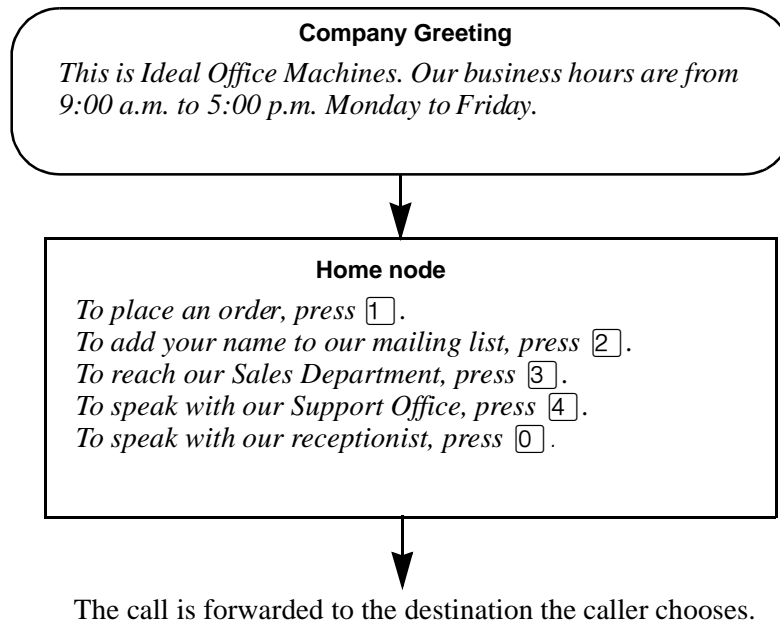
- a menu with choices that lead to other menus, announcements, mailboxes or transfers
- an Information node that plays an announcement
- a Transfer node that transfers callers to an extension or external number
- a Mailbox node that sends callers to a mailbox (Mailbox node)

Callers navigate through the CCR Tree using their telephone keypad to respond to prompts.

While they listen to a menu callers can:

- choose a menu option by pressing a single digit
- transfer to an extension by entering the extension number
- transfer to a mailbox by pressing \* and the mailbox number
- use the Company Directory by pressing #
- transfer to the operator
- switch languages

**Example of a Home node**



## Planning a CCR Tree

To plan a CCR Tree:

- 1 Identify the frequently called departments and extensions.
- 2 Determine which goods and services you want to promote in Information mailboxes.
- 3 Create mailboxes callers can leave messages in.
- 4 Decide what type of Home node you should create.
- 5 Determine destination types.
- 6 Record prompts and messages. By default, a caller can press **9** to hear prompts in an alternate language or **0** to reach an Operator. These options are not included unless you record them as part of the Home node prompt.

## About CCR Tree structure

### Home node

After the Company Greeting, a caller hears the Home node message for the CCR Tree. A Home node can offer up to eight options. Callers can select options such as:

- listening to an Information Message in primary or alternate language
- leaving a message
- transferring to an extension or an external number
- choosing from a sub-menu

By default, 0 is reserved for reaching the Operator, and 9 offers the menu in the alternate language.

The Home node is on Level 0. As sub-menus are added to one another, the caller progresses through the levels of the CCR Tree. You can create up to 11 levels (from 0 to 10).

For an example of Paths through a CCR Tree, refer to [“An example of a CCR Tree” on page 64](#).

### Information Message

An Information Message is a message you record to tell callers about goods or services available from your company. You can tell callers about information such as sales, specials, company events, business hours, price lists, and shipping times. For example:

*We're pleased to announce the arrival of the new FaxEasy line of fax machines. FaxEasy is easy to operate and produces top quality fax images at an affordable price.*

You must create Information mailboxes before you can add an Information Message to a CCR Tree.

### **The Home node can be an Information Message**

You can program the Home node to play an Information Message. For example:

*Come celebrate with us! It's time for Ideal Office Machines' annual get-to-know-our-customers picnic. The annual picnic is on the first Sunday of August from 1:00 to 5:00 p.m. in Thompson Park. See you there.*

If the Home node is an Information Message, the caller disconnects at the end of the message. The other destination types do not apply. For more information on destination types refer to [“Destination” on page 63](#).

### **Using an alternate language for the Home node prompt**

If you record an Alternate Language Home node prompt, you must tell callers about the Alternate Language option in the Home node message. In the Primary Language Home node prompt tell callers to press **9** if they want to hear the message in the Alternate Language. For example:

*To hear this message in [the Alternate Language] press **9**. To place an order press **1**. To add your name to our mailing list press **2**. To reach our sales department press **3**. To speak with the receptionist press **0**.*

### **Sub-menu**

A sub-menu is any menu that callers hear after the Home node. Sub-menus can lead to other sub-menus.

A sub-menu is a prompt that provides callers with another list of options. For example, from the Home node a caller can press **3** to reach the Sales department and hear the sub-menu options:

*To place an order press **1**. To add your name to our mailing list, press **2**. To speak with a Customer Service Representative press **3**. To speak with the receptionist press **0**.*

### **Mailbox node**

Create mailbox nodes to give callers a mailbox where they can leave a message. For example:

*You have reached the Ideal Office Machines Order Desk mailbox. After the tone, leave your name, address, telephone number, and the number of the item you want to order. Thank you.*

### **Transfer node**

A Transfer node transfers callers to an extension or an external number.

## Destination

The destination is where callers go after they listen to an Information Message or leave a message in a mailbox. Each Information Message and Mailbox node must have a destination:

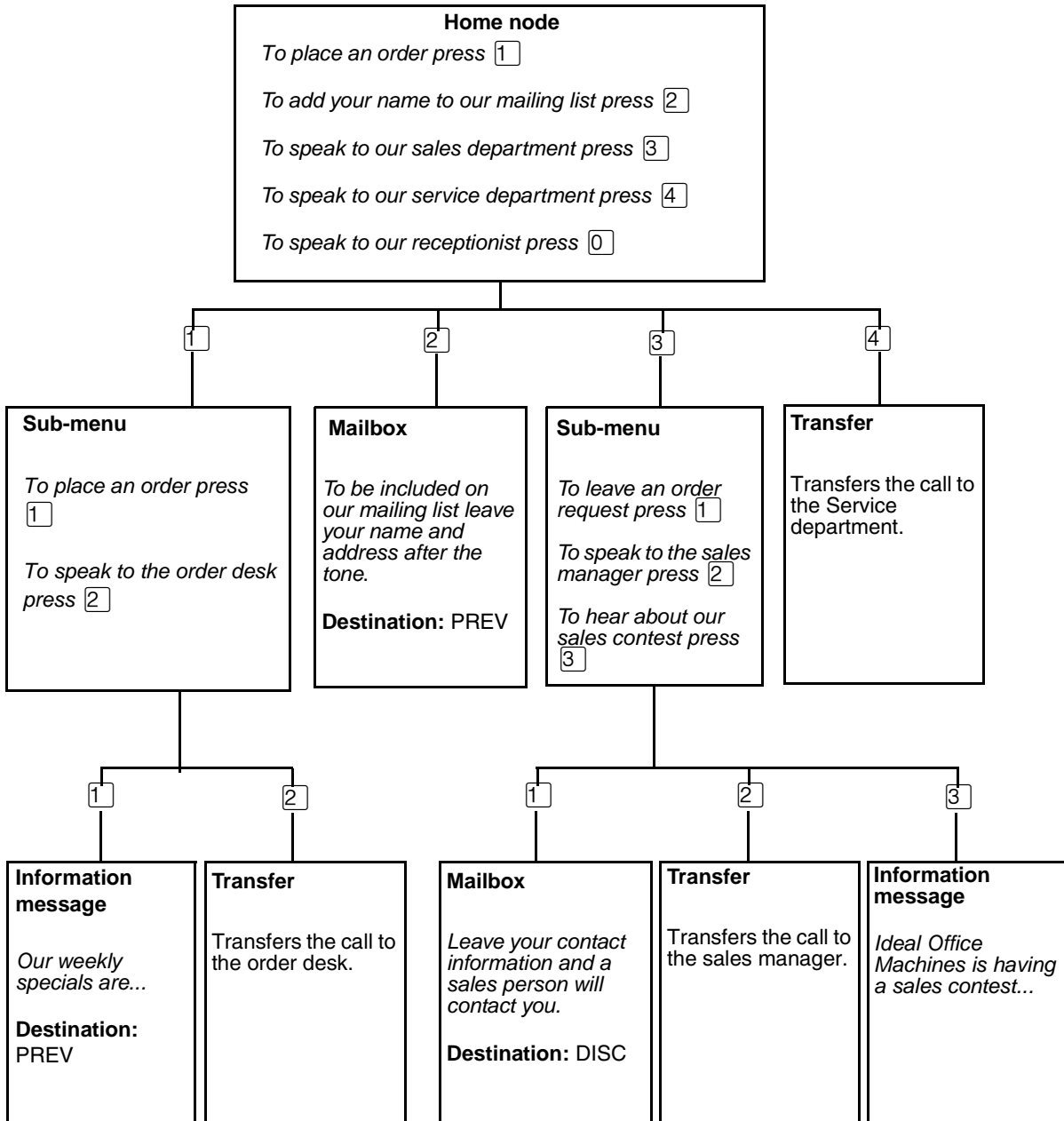
- Previous: returns the caller to the previous menu
- Home: returns the caller to the Home node
- Disconnect: disconnects the call

You can assign destinations only to Information Messages and Mailbox nodes. To see how destinations are used in a CCR Tree, refer to [“An example of a CCR Tree” on page 64](#).

## Paths

A Path can be a series of menus, Information Messages, Mailboxes or Transfers. A Path number is the digit that callers press to go to the next level in a CCR Tree. To see how paths route callers through a CCR Tree, refer to [“An example of a CCR Tree” on page 64](#).

### An example of a CCR Tree





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## Chapter 8

# Working with CCR Trees

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## Building a CCR Tree

You can record your CCR Tree programming in the CCR Tree section of the *CallPilot Programming Record*.

### To build a CCR Tree:

- 1 Create the Home node. The Home node can be a Menu node, an Information node, a Transfer node or a Mailbox node:
  - if you want to give callers a list of options, create a Home menu node
  - if you want callers hear an announcement and then be disconnected, create an Information node
  - if you want callers to transfer to an extension or external telephone number, create a Transfer node
  - if you want callers to be sent to a mailbox to leave a message, create a Mailbox node that is assigned to a Subscriber mailbox

You can also save programming time by basing a new CCR Tree on another Tree and changing the nodes. For more information refer to [“Copying a CCR Tree” on page 68](#).

- 2 Assign the CCR Tree to a Greeting Table.  
You can assign a CCR Tree for each time of day.
- 3 Test the CCR Tree.

## Creating a Home node

Begin to build a new CCR Tree by creating a Home node.

### Creating a Home Menu node

Create a Home menu node if you want to give callers a list of options. You must create a Home Menu node if you want the CCR Tree to have more than one node.

### To create a Home menu node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Create** link for the CCR Tree you want to create.  
The New CCR Tree page appears.
- 3 From the **Create Options** option, select **Home Menu Node**.

- 4 Click the **Submit** button.  
The CCR Tree Properties page shows the new CCR Tree.
- 5 Click the **Change** link for the CCR Tree.  
The CCR Menu Node Properties page appears.
- 6 In the **Caption** box, type a caption name, such as *List of options*, if the Home node is a menu.
- 7 To record the Home node primary and alternate prompts or select previously recorded prompts, click the **Voice** button and follow the steps in [“Recording greetings and prompts” on page 41](#) to record a prompt or follow the steps in [“Importing a greeting or prompt” on page 43](#) to select a previously recorded prompt.
- 8 Click the **Submit** button.

## Creating a Home Information node

Create a Home Information node if you want callers hear an announcement and then be disconnected.

### To create a Home Information node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Create** link for the CCR Tree you want to create.  
The New CCR Tree page appears.
- 3 From the **Create Options** option, select **Home Information Node**.
- 4 Click the **Submit** button.  
The CCR Tree Properties page shows the new CCR Tree.
- 5 Click the **Change** link for the CCR Tree.  
The CCR Info Node Properties page appears.
- 6 In the **Caption** box type a name for the Information node, such as *Sales*.
- 7 To record the Information node primary and alternate messages or select previously recorded messages, click the **Voice** button and follow the steps in [“Recording greetings and prompts” on page 41](#) to record a message or follow the steps in [“Importing a greeting or prompt” on page 43](#) to select a previously recorded message.
- 8 Click the **Submit** button.

## Creating a Home Transfer node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Create** link for the CCR Tree you want to create.  
The New CCR Tree page appears.
- 3 From the **Create Options** option, select **Home Transfer Node**.
- 4 Click the **Submit** button.  
The CCR Tree Properties page shows the new CCR Tree.
- 5 Click the **Change** link for the CCR Tree.  
The CCR Transfer Node Properties page appears.
- 6 In the **Caption** box type a name for the Transfer node, such as *Sales*.
- 7 From the **Outdial Method** list box select an outdial method.  
The outdial method is the telephony resource that is used to transfer the call:
  - Select **Line** to use an external line to transfer the caller to an external telephone number, and enter the line number you want to use.
  - Select **Pool** to use a line pool to transfer the caller to an external telephone number and enter the Line Pool number you want to use.
  - Select **Route** to use a Routing Code to transfer the caller to an external telephone number.
  - Select **Intercom** to transfer the caller to an extension.
- 8 In the **Phone Number** box, type the extension or external telephone number.
- 9 Click the **Submit** button.

## Creating a Home Mailbox node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Create** link for the CCR Tree you want to create.  
The New CCR Tree page appears.
- 3 From the **Create Options** option, select **Home Mailbox Node**.
- 4 Click the **Submit** button.  
The CCR Tree Properties page shows the new CCR Tree. The default mailbox for a Home Mailbox node is the General Delivery Mailbox.
- 5 Click the **Change** link for the CCR Tree.  
The CCR Mailbox Node Properties page appears.
- 6 In the **Mailbox Number** box type the extension of the mailbox you want calls to transfer to.
- 7 Click the **Submit** button.

## Copying a CCR Tree

If you want to create a CCR Tree that is similar to another tree, you can copy a CCR Tree. This saves you programming time, because after you copy the CCR Tree you can change the necessary nodes.

### To copy a CCR Tree

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Create** link for the CCR Tree you want to create.  
The New CCR Tree page appears.
- 3 Click the **Copy of tree** option.
- 4 From the **Copy of tree** list box select the number of the CCR Tree you want to copy.
- 5 Click the **Submit** button.  
The CCR Tree Properties page appears.
- 6 Click the **Change** link for each node that you want to change the properties of.  
After you make the changes to the CCR Tree, click the Close button.

## Adding nodes to the Home node

If you create a CCR Tree with a Home menu node, and you have more choices than fit conveniently in the Home node menu, you can create sub-nodes. To create sub-node menus, add a Menu node to your Home node menu.

After you determine how many options to offer in a menu, you must determine where each option directs the caller.

After you assign a Menu sub-node, assign another set of options in the next level of tree depth. Options for each menu can be:

- another Menu
- an Information mailbox
- a Transfer node
- a Mailbox node

You can assign up to eight options to each menu.

A Menu sub-node gives callers single-digit access to another list of options. For example, if your Home node menu says:

*To place an order press 1. To add your name to our mailing list press 2. To reach our sales department press 3. To speak with our attendant press 0.*

Callers can press 1 to hear more options, such as:

*To hear our weekly specials press 1. To speak with the Order Desk press 2.*

## Adding a Menu node

Create a Menu node to organize choices for your callers, or when you have more choices than can fit on one menu.

### To add a Menu node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Change** link for the CCR Tree that you want to add a Menu node to.  
The CCR Tree Properties page appears.
- 3 Click the **Menu** link.  
The new Menu node appears on the CCR Tree Properties page.
- 4 Click the **Change** link for the Menu node.  
The CCR Menu Node Properties page appears.
- 5 In the **Caption** box type a caption for the node.
- 6 To record the Primary and Alternate prompts, click the **Voice** button and follow the steps in [“Recording greetings and prompts” on page 41](#) to record a prompt from your computer or follow the steps in [“Importing a greeting or prompt” on page 43](#) to select a previously recorded prompt.
- 7 Click the **Submit** button.

## Adding an Information node

An Information node is an Information mailbox that you add to a CCR Tree.

An Information mailbox can give callers information such as specials, company events, business hours or price lists.

### To add an Information node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Change** link for the CCR Tree that you want to add an Information node to.  
The CCR Tree Properties page appears.
- 3 Click the **Information** link.  
The new Information node appears on the CCR Tree Properties page.
- 4 Click the **Change** link for the Information node.  
The CCR Information Node Properties page appears.
- 5 In the **Caption** box type a caption that describes the information, for example, *Store Location and Hours*.

- 6 From the **Destination** list box, select a destination. The destination is the location on the CCR Tree that callers go to after the Information message plays:
  - **Previous:** returns to the Previous menu node
  - **Home:** returns the call to the Home node prompt
  - **Disconnect:** disconnects the call
- 7 To record the Primary and Alternate prompts, click the **Voice** button and follow the steps in [“Importing a greeting or prompt” on page 43](#) to record a prompt from your computer or follow the steps in [“Importing a greeting or prompt” on page 43](#) to select a previously recorded prompt. These prompts are the information message that the caller hears when they are routed to this node.
- 8 Click the **Submit** button.

## Adding a Mailbox node

Adding a mailbox node gives callers a mailbox where they can leave a message or listen to an Information Message, depending on the mailbox type.

A mailbox cannot receive messages until it is initialized. For information on initializing mailboxes, see [“Initializing a mailbox” on page 27](#).

### To add a Mailbox node

Use a Mailbox node to transfer callers to a Subscriber, Information or Fax On Demand mailbox.

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Change** link for the CCR Tree that you want to add a Mailbox node to.  
The CCR Tree Properties page appears.
- 3 Click the **Mailbox** link.  
The new Mailbox node appears on the CCR Tree Properties page.
- 4 Click the **Change** link for the Mailbox node.  
The CCR Mailbox Node page appears.
- 5 In the **Mailbox Number** box type the mailbox number of the Subscriber, Information, or Fax on Demand mailbox you want the call to transfer to. You must create the mailbox before you can assign it to a Mailbox node.
- 6 From the **Destination** list box, select a destination. The destination is the location on the CCR Tree that callers go to after they leave a message.
  - **Previous:** returns to the Previous menu
  - **Home:** returns the call to the Home node prompt
  - **Disconnect:** disconnects the call
- 7 Click the **Submit** button.

## Adding a Transfer node

A Transfer node sends a call to an internal or an external number.

### To add a Transfer node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Change** link for the CCR Tree that you want to add a Transfer node to.  
The CCR Tree Properties page appears.
- 3 Click the **Transfer** link.  
The new Transfer node appears on the CCR Tree Properties page.
- 4 Click the **Change** link for the Transfer node.  
The CCR Transfer Node page appears.
- 5 In the **Caption** box type where you are transferring the caller to, for example *Support Hotline*.
- 6 From the **Outdial Method** list box select an outdial method.  
The outdial method is the telephony resource that is used to transfer the call:
  - Select **Line** to use an external line to transfer the caller to an external telephone number, and enter the line number you want to use.
  - Select **Pool** to use a line pool to transfer the caller to an external telephone number and enter the Line Pool access code you want to use.
  - Select **Route** to use a Routing Code to transfer the caller to an external telephone number.
  - Select **Intercom** to transfer the caller to an extension.
- 7 In the **Phone Number** box, type the extension or external telephone number.
- 8 Click the **Submit** button.

### About transfers to external numbers

When CallPilot transfers a call using a CCR external transfer, it uses two lines. An incoming line connects the caller to the CCR Tree and an outgoing line transfers the caller to the external phone number. Both lines are used while the caller connects to the external phone number. To optimize the use of external lines, the incoming line can be used to make the external transfer. This type of transfer is called a Link transfer.

Not all phone lines allow Link transfers. Ask your telephone service provider if your lines support Link transfers before you program CallPilot to use Link transfers.

To perform a Link transfer for a CCR external transfer you must press  before the telephone number. For example, for the telephone number:

5 5 5 1 2 3 4

5 5 5 1 2 3 4 is the telephone number dialed

For information on preventing unauthorized calls using outdialing, refer to [“Outdial type” on page 24](#).



## Assigning a CCR Tree to a Greeting Table

Before incoming callers can access a CCR Tree, you must assign lines to a Greeting Table. For information about assigning lines to Greeting Tables, refer to [“Configuring line answering” on page 52](#).

### To assign a CCR Tree to a Greeting Table

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Greeting Tables** link.  
The Greeting Tables page appears.
- 3 Click the **Change** link for the Greeting Table you want to assign a CCR Tree to.  
The Greeting Table Setup dialog box appears.
- 4 Select from each **CCR Tree** list box the CCR Tree you want calls to route to for each time of day. If you do not want calls to route to a CCR Tree select **None**.
- 5 Click the **Submit** button.

### Making a CCR Tree a destination in the CLID Routing Table

For information about the CLID Routing Table, refer to [“About the CLID Routing Table” on page 55](#).

To assign a telephone number to a CCR Destination in the CLID Routing Table refer to [“Setting up a CLID Routing Table” on page 56](#).

## Testing a CCR Tree

After you build a CCR Tree and assign it to a Greeting Table, test the CCR Tree. To test the CCR Tree, call the company number and test each node.

Check that:

- the Home node routes the call as designated
- each transfer routes the caller to the intended destination
- each prompt has correct information
- messages are courteous and easy to understand

## Disabling a CCR Tree

Before you make any changes to a CCR Tree you must ensure service is not disrupted by removing any references to the CCR Tree from the Greeting Tables and the CLID Routing Table.

### To remove references to a CCR Tree from a Greeting Table

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **Greeting Tables** link.
- 3 Click the **Change** link for the Greeting Table that uses the CCR Tree that you want to disable. The Greeting Table Setup page appears.
- 4 For each time of day, remove the CCR Tree you want to disable by choosing another CCR Tree number or **None** from the **CCR Tree** list box.
- 5 Click the **Submit** button.

### To remove references to a CCR Tree from a CLID Routing Table

- 1 Click the **Auto-Attendant** heading.
- 2 Click the **CLID Routing Table** link. The CLID Routing Table page appears.
- 3 Click the **Change** link for the CLID Routing Table rule that uses the CCR Tree that you want to disable. The CLID Setup page appears.
- 4 To remove the CCR Tree from the CLID Routing Table, either:
  - select another CCR Tree from the **CCR Tree** list box and enter the path in the **Path** box or
  - select a **Greeting Table**, **Extension** or **Mailbox** to transfer the call to.
- 5 Click the **Submit** button.

## Changing a node

### To change the properties of a node

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Change** link of the CCR Tree that contains the node you want to change.  
The node properties page appears.
- 3 Click the **Change** link for the node you want to change, and change the properties of the node.  
For information about the node properties, refer to:
  - [“Adding an Information node” on page 70](#)
  - [“Adding a Mailbox node” on page 71](#)
  - [“Adding a Menu node” on page 70](#)
  - [“Adding a Transfer node” on page 72](#)
- 4 Click the **Submit** button.

## Deleting a node

### To delete a node

- 1 Click the **Custom Call Routing** heading.
- 2 Click the **Change** link for the CCR Tree that has the node you want to delete.  
The CCR Tree Properties page appears.
- 3 Click the **Delete** link for the node you want to delete.  
A message appears that asks you to confirm the deletion.
- 4 Click the **OK** button.

## Deleting a CCR Tree

Before you delete a CCR Tree, make sure the Tree is disabled. For information about disabling a Tree, refer to [“Disabling a CCR Tree” on page 74](#).

### To delete a CCR Tree

- 1 Click the **Custom Call Routing** heading.  
The CCR Tree Administration page appears.
- 2 Click the **Delete** link for the CCR Tree you want to delete.  
A message appears that asks you to confirm the deletion.
- 3 Click the **OK** button.



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## Chapter 9

# CallPilot reports

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## About CallPilot reports

This chapter describes CallPilot reports and explains how to generate and print them. You can use the following reports to view CallPilot programming, status and available message time.

## Generating a report

### To generate a report

- 1 Click the **Report** heading.
- 2 Click the link for the report you want to generate.  
The report appears in a new window.
- 3 To print the report, click the **Print** button.
- 4 To close the report window, click the **Close** button.

## Types of reports

### Directory Report

This report shows information for mailbox owners listed in the Company Directory and includes:

<b>Subscriber</b>	mailbox owner's name
<b>MN</b>	mailbox number
<b>Type</b>	type of mailbox
<b>Ext</b>	extension number
<b>Name Recorded</b>	whether mailbox owner has recorded their name in the Company Directory
<b>Greeting Recorded</b>	whether mailbox owner has recorded a greeting

If both Name Recorded and Greeting Recorded are N the mailbox is not initialized.

## Mailbox Information Report

This report shows for each mailbox:

<b>MB</b>	mailbox number
<b>Type</b>	SUB Subscriber ADM System Administrator GDM General Delivery Mailbox FOD Fax On Demand FOV Fax Overflow NET AMIS or Site INFO Information
<b>Directory Name</b>	The name of the mailbox. An asterisk appears beside the name if the mailbox name is not in the Company Directory.
<b>Ext</b>	The mailbox extension.
<b>COS</b>	The Class of Service for the mailbox.
<b>Total</b>	The total volume of messages in the mailbox, not including space taken by mailbox greetings, shown as messages (Msg) and minutes (Min).
<b>New</b>	The total volume of new messages in the mailbox, shown as messages (Msg) and minutes (Min).
<b>Outdial</b>	The outdial parameters.

The mailbox can have one or more information messages, which contain an alphanumeric tag and a descriptive string. To reduce the number of report output lines, a mailbox setting or condition is reported only if it is different from the default setting or normal condition.

Possible tags are:

<b>UNINIT</b>	Mailbox is not initialized.
<b>NONAMEREC</b>	Mailbox is initialized, but name is not recorded.
<b>NOGREET</b>	Mailbox is initialized, but Primary greeting is not recorded.
<b>LOCKED</b>	Mailbox is disabled because number of incorrect password attempts is exceeded.
<b>NOMWI</b>	Mailbox has a primary extension, but Message Waiting is disabled.
<b>FULL</b>	Mailbox is full.
<b>NOACCEPT</b>	Subscriber has set mailbox to not accepting messages.

<b>NOADDRESS</b>	Address is not specified.
<b>ALTDN1</b>	Alternate extension 1 is defined.
<b>ALTDN2</b>	Alternate extension 2 is defined.
<b>EXPRLINE</b>	An Express Messaging line is defined.
<b>ATDT</b>	A Target Attendant is defined.
<b>XFERS Screened</b>	Transfers are screened. Blind transfers are normal and are not shown.
<b>METHOD, LIMIT</b>	The delivery method and maximum number of selections for a Fax On Demand mailbox.
<b>RETRY, INT</b>	The number of retries and interval in minutes for a Fax On Demand mailbox.
<b>OPNPHONE</b>	Off-Premise Notification to a telephone.
<b>OPNPAGER</b>	Off-Premise Notification to a pager.
<b>OPNEXT</b>	Off-Premise Notification to an extension.
<b>OPNSTATUS</b>	Current status of Off-Premise Notification, and start and stop times.
<b>TRANSF</b>	The telephone number used when Outbound Transfer is set to an external destination.
<b>FAXPRE</b>	Preset Fax destination.
<b>SELECT, SIZE</b>	For each document in a Fax On Demand mailbox, lists selection ID and size in equivalent message minutes.
<b>AMIS, MBOX</b>	System access phone number and target mailbox number of a AMIS Network Delivery mailbox.
<b>SITE, MBOX</b>	Site address of a Network Delivery mailbox.

## All Mailbox Activity Report

The Mailbox Activity Report shows seven day usage information for all Subscriber mailboxes on the system.

The starting point of this report is the last full day of activity. For example, if the full day of activity is Tuesday, the report begins on Tuesday and goes back seven days to the previous Wednesday.

When you print this report, check that the printer has enough paper. Because of the size of this report, print at night or during a slow time. To get the full benefit of this report, print it on the same day each week and reset the statistics after each printing.

The Mailbox Activity Report shows:

- number of messages recorded and their total length and average length
- number of times the maximum message length is reached
- number of messages received and their total length and average length
- number of times the mailbox is accessed for log on or call answering, with total connect minutes and resulting average
- average time before new messages are played
- average time before messages are deleted
- number of times when log on authentication fails three times in succession. (A possible attempt at unauthorized access to a mailbox.)
- cumulative averages for the above
- whether Primary, Alternate and CLID-based Greetings are recorded

After you generate this report, you can reset the statistics to set the counters to zero. If you reset the statistics, all the Subscriber mailboxes are affected, not just a selected mailbox.

## Event Log Report

The Event Log Report lists events that can help you diagnose system problems. Events are shown with their date, time and error message.



## CCR Tree Usage Report

This report shows the Tree number, the Greeting Tables the CCR Tree is assigned to, the date the Tree was last modified, and the Tree status. The report also shows the Path, type, description, destination, a seven-day rolling count of the number of calls received by the Tree and the number of times each path is visited. Print the Custom Call Routing Report on the same day each week to get an accurate representation of CCR activity.

If a CCR Tree is changed, for example if it is saved or deleted, the current usage statistics are cleared.

Generate this report before you modify a CCR Tree.

The CCR Tree Report shows for the previous seven days:

- the number of calls received by the CCR Tree
- the number of times each node was visited
- the Greeting Table from which the CCR Tree is referenced
- the last seven days for which record collection is complete. The day the report is generated is not included because data collection is not complete for this day.
- the most recent complete day in the left column
- usage data as zeroes for dates prior to the last change date. Statistics for the day of the change include only activity that occurs after the modification is made.

The CCR Tree Report shows:

<b>Path</b>	The selections a caller makes to reach a node. Usually the Home node is 0, although callers do not need to press a key to reach the Home node.
<b>calls for each day</b>	<p>Below each day is listed how many times callers accessed the node, not including any re-prompting.</p> <p>The calls for each day details:</p> <ul style="list-style-type: none"> <li>• each call that arrives at the Tree</li> <li>• calls that go from the Home node to sub-nodes</li> <li>• calls that are sent to the node from CLID-based routing</li> <li>• calls that return to a Menu node by the previous menu operation (by pressing [*] at a sub-menu, or by the Next Action setting)</li> </ul> <p>The difference between the count for a menu and the sum of the counts for its sub-node is the number of times callers exit the menu by pressing [*] or hanging up.</p>
<b>Total calls</b>	<p>Total Calls shows calls that go to the Home node from a Greeting Table and calls that go to any node in the CCR Tree from CLID-based routing.</p> <p>In the absence of CLID-based Routing, the count of the Home node is usually the same as the Total Calls if the Home node is an Information node.</p> <p>The count can be higher if the Home node is a Menu node because the count of any Menu node is included if the caller returns to the menu.</p>

## Port Usage/Call Handling Report

This report summarizes inbound and outbound call activity and port usage on a seven-day rolling basis. Use this report to identify volume and sources of call traffic, and to determine if additional system ports are needed.

Use the Port Usage section:

- to see the volume and sources of call traffic
- to determine if additional system ports are needed
- to find time periods where an insufficient number of ports is available
- to see a summary of inbound and outbound call activity and port usage on a 7-day rolling basis

The Port Usage section:

- shows the last seven days for which record collection is complete
- shows the most recent statistics in the left column
- does not include the current day, because record collection for this day is not complete

<b>Allocation</b>	shows the minimum and maximum number of ports allocated to voicemail.
<b>Port Status</b>	shows an asterisk (*) beside the port number if the port is disabled when the report is generated.
<b>Period start</b>	for each day of the week shows the percentage of the time period when all ports were busy A non-zero value is possible, but a value consistently higher than 1% or 2% during peak time periods indicates a need for additional ports Periods in which at least one port is disabled are shown with an asterisk

Use the Call Handling section to see the type of calls that create traffic for the voicemail server. Look for differences over time by weekday.

The Call Handling section shows:

- each class of call by number of calls, total duration, and average duration
- all outgoing calls in a single category. For example, a call is counted as a Message Notification even if the called party logs on.
- Outbound Transfer calls with the few seconds of additional connect time caused by the unsupervised transfer included in the connect time of the incoming call
- Call Screening calls with the holding time of the call to the subscriber set counted under the total connect time for the incoming call
- all days even if no data is collected for that day. These values are shown as zeroes.

## Fax Usage Report

Use the Fax Requests Report:

- to see Fax On Demand requests
- to see date and time of faxes
- to see the document number requested
- to see the delivery fax number
- to see CLID of callers

The Fax Requests Report shows:

- The Caller ID of the call requesting the fax, truncated if necessary to fit the space available.
- One line is generated for each document requested.
- If a caller requests several documents during a call, there are several lines in the report, each with the same CLID and Fax destination, and similar time stamps. This facilitates sorting for sales lead generation purposes, but does not show whether the item was ordered individually or as part of a set.
- The Fax Destination column shows the target fax number if the two-call method is used or One Call if the one-call method is used.
- The report lists committed requests only, in chronological order.
- The report does not include one-call requests if the caller hangs up before transmission begins or two-call delivery requests if the delivery number does not pass dialing restrictions.
- The report does not track whether the requested item was successfully delivered.
- If there are no fax requests to report for a day, no entries appear.

The information in the Fax Requests Report:

- is kept for the last seven days for which records are complete
- does not include traffic for the current day since this day is not complete

## System Configuration Report

The System Configuration Report shows how the system is configured.

\*Some sections are for options and appear only if the option is installed.

<b>System options</b>	Describes system-wide attributes included in <a href="#">“Setting the system properties” on page 87</a> , and Auto Attendant properties such as Return to AA and Touchtone Gate.
<b>Installed voicemail options</b>	Lists the optional features enabled at your site.
<b>AA Greetings</b>	Lists system greetings, shows whether the greeting is recorded and lists the Greeting Tables that reference it. Greetings that are not recorded or used in any Greeting Table are not shown. The comment “TTG” appears for the prompt used as the custom Touchtone Greeting prompt.
<b>Greeting table</b>	Shows the configuration of each Greeting Table.
<b>Call Center parameters</b>	Appears if Call Center is installed. The Primary Alert, Secondary Alert, MIS Address and Refresh Channels are shown.
<b>Voice Button properties</b>	Shows whether Multimedia Call Center is enabled, the server address and the server port.
<b>Call Center agents</b>	Appears if Call Center is installed. Shows the agents in the Call Center, their agent number, priority level and skillset status.
<b>Call Center skillsets</b>	Appears if Call Center is installed. Shows skillset number and Day and Night status.
<b>Call Center routing tables</b>	Appears if Call Center is installed. Lists skillset name, number, Day Service and Night Service configuration.
<b>Call Center overflow</b>	For each skillset, shows if it is enabled, the Intelligent overflow rule that applies to it, its service mode, condition and action.
<b>Call Center greetings</b>	Appears if Call Center is installed. Displays the status and skillset for each greeting.
<b>Call Center Intelligent CLID/DNIS routing</b>	Shows the CLID/ANI or DNIS rule and action for each line.

<b>Line answering</b>	Shows the answering parameters for each line answered by CallPilot or Call Center. Lines that are not answered are not shown. This section does not appear if your switch does not require line administration. The skillset column appears only if Call Center is enabled. Skillset is blank for AA lines and Rings and Tables are blank for Call Center lines.
<b>*Fax parameters</b>	The System Fax DN parameter is shown. Other parameters appear only if the corresponding Fax option is installed.
<b>*General networking parameters</b>	Appears if Message Networking is installed. It displays the General Networking properties.
<b>*AMIS networking parameters</b>	Appears if Message Networking is installed. It displays the AMIS-related parameters of the site that you set in Networking properties.
<b>*Digital networking parameters</b>	Appears if Message Networking is installed. It displays the digital-related parameters of the site that you set in Networking properties.
<b>*Site table</b>	Appears if Message Networking is installed.

## Resetting Mailbox statistics

You can reset the statistics for all mailboxes, or an individual mailbox.

### To reset the statistics for all mailboxes

- 1 Click the **Reports** heading.
- 2 Click the **Reset Mailbox Activity** link.  
A message appears that asks you to confirm the request to reset the statistics.
- 3 Click the **Reset** button.

### To reset the statistics for an individual mailbox

- 1 Click the **Mailbox Administration** heading.
- 2 Click the **Change/Delete Mailbox** link.  
The Mailbox List page appears.
- 3 Click the **Activity** link for the mailbox you want to reset the statistics of.  
The statistics for the mailbox are reset.



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## Chapter 10

# CallPilot system properties

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### Setting the system properties

- 1 Click the **Configuration** heading.
- 2 Click the **System Properties** link.  
The System Properties page appears. The Voice Mail version is displayed.
- 3 In the **Max Outcalling Channels** box type the maximum number of channels used for calls generated by voicemail. Do not type a value that is higher than 50% of your available channels. The limit ensures that there are enough channels to accept incoming calls from outside callers and subscribers. The default number of voice channels assigned for outcalling is 1. If you have Multimedia Call Center installed on your system, set the Max Outcalling Channels to a value higher than 1. Also, to ensure that the Outcalling Channels do not consume all the available voice ports, set the minimum number of voice ports to a number higher than the Outcalling Channels. For more information see the *Business Communications Manager 2.5 Programming Operations Guide*.
- 4 The **Enable Voice Mail** check box to is selected by default. If you enable voicemail, callers who call an extension that does not answer or is busy transfer to the extension's mailbox. If you clear the Enable Voice Mail check box:
  - external Callers cannot leave messages in mailboxes. Callers are returned to the Automated Attendant to make another choice.
  - Callers can leave messages through Custom Call Routing, Feature 980, and Feature 986. Callers can send and receive messages using Feature 981.
  - Subscribers can record and send messages from their mailbox to other CallPilot mailboxes
- 5 Select the **Enable Group List** check box if you want to enable Group Lists.  
If you clear the Enable Group List check box, you cannot set up Group Lists and do not need to reserve a digit in your numbering plan for the Group List Leading Digit.
- 6 If you use Group Lists, in the **Group List Leading Digit** check box type the Group List Leading Digit. This digit is used as the prefix for Group Lists during addressing. You cannot create mailboxes with numbers that start with this digit. The default setting for the Group List Leading Digit is 9. For example, if you assign as 9 the Group List leading digit, 901 to 999 is your range for Group Lists.
- 7 Select the **Enable External Initialization** check box if you want subscribers to be able to initialize their mailboxes from an external location. The default for this check box is not selected. If you do not enable external initialization subscribers can initialize their mailboxes only from a local extension. This prevents unauthorized access to mailboxes.
- 8 The **Make Directory Available** check box is selected by default. If you clear the check box, access to the Company Directory is removed from the Automated Attendant.
- 9 The **Enable General Delivery Mailbox** check box is selected by default. This setting is for Norstar only. If you clear this check box, external calls are not directed to the General Delivery Mailbox. External calls are directed back to an Automated Attendant prompt or a CCR Menu prompt.

- 10** The **Enable Redirect DN** check box is not selected by default. If redirect DN is enabled, voicemail uses the original dialed number when it receives a redirected call. A call is redirected if a set that is call forwarded on busy to another location does not answer the call. The call returns to the original site for call answering.  
Select this check box only on the advice of support personnel.
- 11** The **Enable Bilingual** check box is selected by default. If you clear this check box alternate language prompts are not available. Disabling bilingual operation affects:
- language designations for Automated Attendant greetings
  - voice prompt selections for callers who use the Automated Attendant
  - voice prompt selections for callers who transfer to mailbox greetings
- 12** Select a primary language from the **Primary Language** list box. Prompting occurs in this language.
- 13** Select an alternate language from the **Alternate Language** list box. The alternate language cannot be the same as the primary language.
- 14** Select the **Canadian Pronunciation** check box if you want voice prompts that include the letter "z" to be pronounced "zed" instead of "zee". The Canadian Pronunciation check box appears only if North American English is the primary or alternate language.
- 15** From the **Directory Search By** list box select **first name**, **last name** or **both**. The default is last name.
- 16** Select the **Enable CallPilot User Interface** check box if you want to let subscribers select Norstar Voice Mail or CallPilot as their mailbox user interface.
- 17** In the **Name Prefix** box type a one to two-digit prefix that controls CallPilot style addressing. The default is 11. If CallPilot User Interface is enabled, this value must be specified, and cannot conflict with the Group List leading digit. This value is ignored if you do not enable CallPilot User Interface.
- 18** In the **Special Prefix** box type a one to two-digit prefix that controls CallPilot style addressing. The default is 19. If CallPilot User Interface is enabled, this value must be specified, and cannot conflict with the Group List leading digit. This value is ignored if you do not enable CallPilot User Interface.
- 19** From the **Primary UI Style** list box select **NVM** or **CallPilot**. This setting is available for Norstar only. For other systems CallPilot is the default user interface.
- 20** Select the **Reset Admin Password** check box if you want to reset the administration password to the default (0000). The next time you log on to the System Administrator mailbox using Feature 981 or CallPilot Manager, you must enter and verify a new password.
- 21** Click the **Submit** button.



**Note:** If you reset the Administration Password, create a new password as soon as possible. While the default Administration Password is used CallPilot Manager or Call Center is open to unauthorized access.

For additional security, change the Administration Password regularly.

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# Chapter 11

## Dialing Translation

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### About Dialing Translation

Dialing translation is a process by which the number of an incoming call from a public network is translated by a translation table into a number that can be recognized and dialed on the local network using the Reply feature.

For Dialing Translation to occur, you must create a Dialing Translation Table that translates the digits of an external number into a number that can be dialed by CallPilot. CallPilot consults the restrictions and schedules tables before dialing the number.

The Dialing Translation Tables are necessary only for the Reply feature. CallPilot does not require the tables to function normally.

### How the Dialing Translation Table works

A phone number is derived from information attached to an incoming Caller ID message. The number is then searched for by the CallPilot in the Dialing Translation Table. If the leading digits of the telephone number match a Dialing Translation Table Input value (the number CallPilot searches for in the Dialing Translation Table), the Output value is substituted for the Input value. This change results in a telephone number that can be dialed on the local network. Changing the number usually involves removing an area code or inserting an access code, based on the dialing rules of the local network. For example, if a local number is prefixed with the long distance code 1, it is removed by the Dialing Translation Table.

The Dialing Translation process is immediate so calls do not take any longer to dial. Some telephone numbers do not need to be changed before dialing. CallPilot functions without a Dialing Translation Table.

#### Phone number Translation

The Dialing Translation Table must define each possible case where a change is needed to allow the number to be dialed on the local network.

The Dialing Translation Table changes Network extensions into numbers that can be dialed on the local network. The Network extension form of a phone number is the usual form in which the number appears. For example, the phone number 403-555-5050, in its Network extension form, must be translated into a number that can be dialed on the local telephone network. The Dialing Translation Table follows the rules required to make the call.

## Examples of Dialing Translation Tables

The following tables are examples of Dialing Translation Tables and how they function. Every Dialing Translation Table entry consists of an Input value column and an Output value column. The values in the Input column represent the leading digits of the Network extensions which, if matched, are replaced by the corresponding value in the Output column. The \* after a value signifies any digits in the telephone number that remain to be dialed. CallPilot automatically adds the \* after every Input and Output value.

A telephone number either matches or does not match a specific Input value.

### An example of a Dialing Translation Table from a site in metropolitan Toronto

INPUT	OUTPUT	Explanation
011*	011*	The Table does not attempt to translate international telephone numbers.
416*	*	The Table removes the 416 area code and dials all calls as 7 digits.
905206* 90527* etc. (135 more entries)	905206* 90527* etc. (135 more entries)	These telephone exchanges can be dialed as local (no long distance charges) 10 digit calls from the 416 area.
905*	1905*	All other 905 numbers not listed in the Input column are long distance numbers and must be dialed as 11 digit long distance numbers.
*	1*	Any numbers that start with digits other than 011, 416 and 905 are long distance, and have 1 added as a prefix.

### A sample Dialing Translation Table from a site with area code 206 near the border with area code 360

INPUT	OUTPUT	Explanation
011*	011*	The Table does not attempt to translate international telephone numbers.
20644* 206626* etc. (40 more entries)	44* 626* etc. (40 more entries)	Due to the site location, some calls can be dialed as local 7 digit numbers.
206*	1206*	All other 206 numbers require 11 digit long distance dialing.
360224* 360227* 360472*	360224* 360227* 360472*	These 360 numbers can be dialed as 10 digit local numbers...
360*	1360*	... but all other 360 numbers are 11 digits long distance numbers.
*	1*	All numbers starting with other than 011, 206 and 360 are long distance and have 1 added as a prefix.

**An example of a Dialing Translation Table from a site in Mountainview, California**

INPUT	OUTPUT	Explanation
		<p>The Dialing Translation Table is empty. The local network in Mountainview supports 10 digit national dialing with recognized long distance charging.</p> <p>In situations like the Mountainview example, there is no need to build a Dialing Translation Table.</p>

**Network Access**

The Dialing Table Translation results in a number that can be dialed on the local network. The final step is to prefix any digits required to reach the local network from your Business Communications Manager 2.5 or Norstar system. For systems that are behind a PBX or PABX, typically in North America 9 must be prefixed to the telephone number. For systems attached to Central Office (CO) lines no digits need to be prefixed.

**Dialing Translation properties**

Dialing Translation is controlled by four properties:

**Long distance access code**

This prefix, if specified, is removed from any numbers entered by the subscriber if it is not needed to make the call. This simplifies the creation of the Dialing Translation Table. For North America, set the long distance access code to 1. The default for this parameter is none. The field for this parameter is a maximum of 1 digit.

**Area code**

If the phone number entered appears to be missing an area code, an area code is prefixed to the number. The area code is considered missing if the number has fewer than 10 digits. The default for this parameter is none. The field for this parameter is a maximum of 6 digits. If this parameter is set to none, no area code is prefixed to the telephone number.

**Access code**

In North America, the access code is usually 9. This number is prefixed to all numbers after Translation to access the local telephone network. If your system is attached directly to CO lines, set the Access Code to none. The default for this parameter is none. The field for this parameter is a maximum of 2 digits.

**Reply translation**

If set to N (no), the caller must manually trim the Caller ID message information for the number to be dialed on the local network. If the reply translation is set to Y (yes), then the Reply feature uses the Dialing Translation Table to dial the call. The default for this parameter is N.

To make it easier for subscribers, set the Reply Translation to Y if a Dialing Translation Table is created. If a Dialing Translation Table is not created, set the Reply Translation to N.

## Setting Dialing Translation properties

Setting the Dialing Translation properties makes it easier to build a Dialing Translation Table. It is not a prerequisite of operating CallPilot to set the Dialing Translation properties.

### To set the Dialing Translation properties

- 1 Click the **Configuration** heading.
- 2 Click the **Dialing Translation Properties** link.  
The Dialing Translation Properties page appears.
- 3 In the **Long Distance Access Code** box type the long distance access code.
- 4 In the **Area Code** box type the area code.
- 5 In the **Access Code** box type the access code.
- 6 Select the **Enable Reply Translation** box if you want to enable reply translation.
- 7 Click the **Submit** button.

## Building a Dialing Translation Table

To build a Dialing Translation Table, you must enter an Input value and an Output value for each entry. The Input value is the number that the CallPilot 150 or Business Communications Manager 2.5 system looks up in the Dialing Translation Table. If the corresponding entry matches, the system substitutes the Output value for the Input value. The resulting number is ready to dial on the local network. Refer to [“An example of a Dialing Translation Table from a site in metropolitan Toronto” on page 90.](#)

### To build a Dialing Translation Table

- 1 Click the **Configuration** heading.
- 2 Click the **Dialing Translation Table** link.  
The Dialing Translation Table page appears.
- 3 Click the **Add** button.  
The Dialing Translation Setup page appears.
- 4 In the **Input Value** box type the input value.
- 5 In the **Output Value** box type the output value.
- 6 Click the **Submit** button.

## Reviewing Dialing Translation Table entries

You can review the entries in the Dialing Translation Table at any time.

### To review Dialing Translation Table entries

- 1 Click the **Configuration** heading.
- 2 Click the **Dialing Translation Table** link.  
The Dialing Translation Table page appears.
- 3 After you review the Dialing Translation Table entries, click the **Main** button.

## Changing a Dialing Translation Table entry

After you build a Dialing Translation Table you can change the Output value of an entry at any time.

You cannot change the Input value of an entry. You must delete the entry and create a new entry with new Input and Output values. Refer to [“Deleting a Dialing Translation Table entry” on page 94](#).

### To change an entry in the Dialing Translation Table

- 1 Click the **Configuration** heading.
- 2 Click the **Dialing Translation Table**.  
The Dialing Translation Table page appears.
- 3 Click the **Change** link for the value you want to change.  
The Dialing Translation Setup page appears.
- 4 In the **Output Value** box, type the new output value.
- 5 Click the **Submit** button.  
Repeat to change any other entries in the Dialing Translation Table.

## Deleting a Dialing Translation Table entry

You can delete an entry in the Dialing Translation Table at any time. To find the entry you want to delete, refer to [“Reviewing Dialing Translation Table entries” on page 93](#).

### To delete an entry in the Dialing Translation Table

- 1 Click the **Configuration** heading.
- 2 Click the **Dialing Translation Table** link.  
The Dialing Translation Table page appears.
- 3 Click the **Delete** link for the Dialing Translation entry you want to delete.  
A message appears that asks you to confirm the deletion.
- 4 Click the **OK** button.

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## Chapter 12

# CallPilot Manager configuration

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### Enabling software authorization codes

You can enable software authorization codes to increase the number of mailboxes on your system, or to enhance your system with options such as Fax and Message Networking. Contact your service representative if you want to try or purchase a software authorization code.

#### To enable a software authorization code for Business Communications Manager 2.5

- 1 Point your web browser to the URL  
`http://<IP address>:6800`  
where <IP address> is the IP address of Business Communications Manager 2.5.  
The Business Communications Manager 2.5 Unified Manager screen appears.
- 2 Click the **Configure** button.  
The Login screen appears.
- 3 In the **User ID** box type the supervisor user ID. The default user ID is *supervisor*.
- 4 In the **Password** box type **the password**. The default password is *visor*.
- 5 Click the **Login** button.  
The Business Communications Manager screen appears.
- 6 Click the **System** key.
- 7 Click the **Licensing** heading.  
The Licensing Setting screen appears.
- 8 On the **Configuration** menu click **Add a Keycode**.  
The Applied Keycodes screen appears.
- 9 In the **Keycode** box type the number of the software authorization code for the option you want to install.
- 10 Click the **Save** button.

#### To enable a software authorization code for CallPilot 150

- 1 Click the **Configuration** heading.
- 2 Click the **Installed Options** link.  
The Installed Options page appears.
- 3 In the **Keycode** boxes type the software authorization code for the option you want to install.
- 4 Click the **Add** button.  
The option you installed appears in the Installed Options list.

## Viewing switch properties

### To view switch properties

- 1 Click the **Configuration** heading.
- 2 Click the **Switch Properties** link.  
The Switch Properties page appears.

Switch properties are:

- **Digits per extension:** the length of mailbox numbers and extension numbers at the site. CallPilot requires that these numbers are the same length. For Norstar switches, the digits per extension are determined by the switch.

System-defined mailboxes such as the administrator mailbox have a mailbox number that automatically adjusts to suit the new length.

- **Voicemail DN:** the main system DN. For Norstar systems, this value is display only, and is determined by the voicemail application on startup. On non-Norstar environments, you can enter the DN.

## Creating Access Passwords

Access passwords control access to administration functions.

Create a Call Center administration password if you want the Call Center Administrator to be able to administer Call Center without being able to control other CallPilot Manager settings. The Call Center administration password cannot be the same as the system administrator password or the modem access password.

Create a modem access password if you want to enable modem access. With modem access Nortel Networks distributors and support people can use a modem to connect to the CallPilot system and download the system log. This feature is available only for CallPilot 150. For information about using modem access refer to the *CallPilot 150 Installation and Maintenance Manual*.

### To set access passwords

- 1 Click the **Configuration** heading.
- 2 Click the **Access Passwords** link.  
The Access Passwords page appears.
- 3 To set an access password for Call Center administration:
  - In the **Call Center Administration** box type the Call Center administration password.
  - In the **Confirmation** box type the Call Center administration password again.



- 4 To set an access password for modem access:
  - In the **Modem Access** box type the modem access password.
  - In the **Confirmation** box type the modem access password again.
- 5 Click the **Submit** button.

## Configuring CallPilot network settings

You can set the names and addresses that appear for CallPilot Manager in browser windows and in the network environment.

Configure CallPilot network settings through CallPilot Manager only if you use CallPilot 150. If you use Business Communications Manager you configure CallPilot networks settings through Unified Manager.

### To set the unit address and identification properties

- 1 Click the **Configuration** heading.
- 2 Click the **Unit Address/Identification** link.  
The Unit Address/Identification page appears.
- 3 In the **IP Address** box type the Internet address of your CallPilot server.
- 4 If you want to reset the IP address to the factory default, click the **Reset to Defaults** button.
- 5 In the **Subnet Mask** box type the subnet mask address.
- 6 In the **Primary DNS** box type the IP address of your network's primary Directory Name Server.
- 7 In the **Secondary DNS** box type the IP address of your network's backup Directory Name Server. The secondary DNS is optional.
- 8 In the **Default Gateway** box type the IP address of your network's gateway server. The default gateway is optional.
- 9 Click the **Submit** button.



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## Chapter 13

# CallPilot Manager operations

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## Backing up and restoring CallPilot information

You can back up CallPilot Manager information if you use a CallPilot 150 system. If you use a Business Communications Manager 2.5 system you back up the system using the Unified Manager Backup, Restore and Upgrade utility.

For information on how to back up and restore CallPilot Manager information:

- for CallPilot 150 refer to the *CallPilot 150 Installation and Maintenance Manual*
- for Business Communications Manager 2.5 refer to the *Business Communications Manager 2.5 Programming Operations Guide*

## Resetting CallPilot

You can reset CallPilot settings back to the factory default.



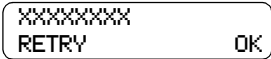
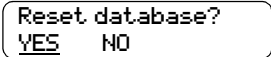
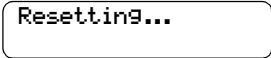
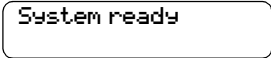
Resetting CallPilot settings removes all mailboxes, messages, contents and programming, except for software authorization codes. The software authorization codes are not removed.

If you are resetting CallPilot 150 you can keep the system's IP Address, Subnet Mask and DNS settings.

### To reset CallPilot for CallPilot 150

- 1 Click the **Operations** heading.
- 2 Click the **Reinstall** link.  
A message appears that asks you to enter your System Administrator password to continue.
- 3 Type your **System Administrator** password in the box, and if you want to keep the system's IP Address, Subnet Mask and DNS settings, select the check box.
- 4 Click the **Submit** button to continue.  
A message appears that says that the reinstallation is in progress.  
When the reinstall is complete, the Login page appears.
- 5 After you log on, the Quick Installation Wizard appears.

## To reset CallPilot for Business Communications Manager 2.5

- 1 Press .
- 2 Enter the default Operator password  (Operator) and press OK.  

- 3 Press .
- 4 Type the password  (Reinstall).  

- 5 Press OK.  

- 6 Press YES.  

- 7 The reinstallation is in progress.  

- 8 When the reinstall is complete the displays shows *System ready*. The next time you log on the Quick Installation Wizard appears.  


## Changing the Operator settings

### Setting the Automated Attendant Status

When your company Receptionist or Operator is available to respond to callers, set the Automated Attendant Status to Yes. When your company Receptionist or designated Operator goes for a break or leaves in the afternoon set the Automated Attendant Status to No.

When the Automated Attendant Status is set to No, a caller who requests an Operator is informed the Operator is not available, and is transferred to the Menu options to dial another extension or leave a message.

### To set the Automated Attendant Status

- 1 Click the **Operations** heading.
- 2 Click the **Operator Settings** link.  
The Operator Settings page appears.
- 3 Check the **Attendant Available** option if the Operator is available.
- 4 Click the **Submit** button.

### Changing the Business Open setting

The Business Open setting overrides the scheduled times programmed for the Morning, Afternoon, and Evening in the Greeting Tables.

When Business Open is set to Yes, greetings are played according to the time scheduled in the Greeting Tables. For example, if Business Open is set to Yes, the Morning, Afternoon and Evening Greetings play automatically according to the start times programmed in the Greeting Tables.

When the Receptionist or designated Operator sets the Business Open to No at the end of the business day or prior to the weekend, the Non-business hours Greeting continues to play until the Business Open is set to Yes.

Ask the Receptionist or designated Operator to select the Business Open check box in the morning when your company opens. Ask the Receptionist or designated Operator to clear the Business Open check box at the end of the business day.

### To change the Business Open setting

- 1 Click the **Operations** heading.
- 2 Click the **Operator Settings** link.  
The Operator Settings page appears.
- 3 Select the **Business Open** check box if you want to enable the Business Open setting.
- 4 Click the **Submit** button.

## Changing the Answer Lines Status

CallPilot can answer all your Central Office (CO) lines included in line configuration. When Answer Lines is enabled, CallPilot answers all incoming calls and presents each caller with the Company Greeting and Automated Attendant Menu. You can designate whether or not CallPilot answers your company lines. If Answer Lines is disabled, CallPilot does not answer incoming calls. All incoming calls must be answered and routed by your company Receptionist.

### To change the Answer Lines Status

- 1 Click the **Operations** heading.
- 2 Click the **Operator Settings** link.  
The Operator Settings page appears.
- 3 Select the **Answer Lines** check box to have your lines answered by CallPilot, or do not select the check box if you want the receptionist to answer calls.
- 4 Click the **Submit** button.

## Changing the Attendant default extension

Whenever anyone asks to speak to your company Receptionist or Operator, CallPilot transfers the call to the Attendant extension. You can change the Receptionist or designated Operator extension number. If the Attendant extension number changes, you must change the extension of the General Delivery Mailbox to the new extension number of the Operator. Callers can request to speak to your company Receptionist or designated Operator when the Automated Attendant prompt announces the option and the Operator status is set to Yes. Callers who request an Operator are transferred to the new extension. If the Operator does not answer, the call transfers to the General Delivery Mailbox.

### To change the Operator default extension

- 1 Click the **Operations** heading.
- 2 Click the **Operator Settings** link.  
The Operator Settings page appears.
- 3 In the **Attendant** box, type the Operator's extension number.
- 4 Click the **Submit** button.

## Resetting the Operator password

You can reset the Operator password to the default at any time.

The default Operator password is 6 7 3 7 2 8 6 7 (Operator).

### To reset the Operator password

- 1 Click the **Operations** heading.
- 2 Click the **Operator Settings** link.  
The Operator Settings page appears.
- 3 Select the **Operator Password** check box.
- 4 Click the **Submit** button.

## Changing CallPilot Manager settings from a remote telephone

You can access CallPilot Manager to change a greeting or the Business Status by using the dialpad of an external tone dial telephone. Remote Administration must be done through the System Administrator Mailbox. The System Administrator Mailbox must be initialized before Remote Administration can be accessed.

For information about Remote Administration, refer to the *CallPilot Reference Guide*.

## Operator settings

With the Operator settings you can:


- set the Operator Status to On or Off
- change the Operator password
- set the Business Status
- assign CallPilot Line answering
- change Automated Attendant Status

### Setting the Operator status

Set the Operator status to Yes when your receptionist or operator is available to respond to callers. Set the Operator status to No when your receptionist or designated operator goes for a break, lunch, or leaves in the afternoon.

When the Operator Status is set to No, a caller who requests an Operator is informed the Operator is not available, and is transferred to the Automated Attendant to dial another extension or leave a message.

### To set the Operator status

1 Press  9 8 2.

Pswd:  
RETRY OK

2 Enter the default Operator password 6 7 3 7 2 8 6 7 (Operator) and press OK.


To change the Operator password, see [“Changing the Operator password”](#) on page 105.

Choose option  
OPER MODE

3 Press OPER.

Atdt avail: N  
CHNG NEXT

4 Press CHNG to select Y or N.

5 Press  to end the session.



## Changing the Operator password

You can change the Operator password at any time. The password must be between four and eight digits, and cannot begin with a zero.

### To change the Operator password

- 1 Press **[\*] 9 8 2**.
- 2 Enter the Operator password and press **OK**.  
The default Operator password is **[6] [7] [3] [7] [2] [8] [6] [7]** (Operator).
- 3 Press **OPER**.
- 4 Press **[7]**.
- 5 Enter a new Operator password between 4 and 8 digits long and press **OK**.
- 6 Press **[\*]** to end the session.

## Changing the Operator default extension

When callers request to speak to your company Receptionist or Operator, CallPilot transfers the call to the Operator's extension. You can change the receptionist or designated Operator extension number. Callers can request to speak to your company receptionist or designated Operator if the Automated Attendant voice prompt announces the option and the Operator Status is set to Yes.

### To change the Operator default extension

- 1 Press **[\*] 9 8 2**.
- 2 Enter the Operator password and press **OK**.
- 3 Press **OPER**.
- 4 Press **NEXT** until you see the display in step 4.
- 5 Press **CHNG**.
- 6 Enter the Operator extension.
- 7 Press **[\*]** to end the session.

Callers who request the Operator are transferred to the new extension. If the Operator does not answer, the call is transferred to the General Delivery Mailbox.

## Setting the Business Status

The Business Status setting overrides the Morning, Afternoon, and Evening Greeting Tables.

If you set the Business Status to Yes, greetings are played according to the time scheduled in the Greeting Tables. For example, if Business Status is set to Yes, the Morning, Afternoon and Evening Greetings play automatically according to the start times programmed in the Greeting Tables.

When the receptionist sets the Business Status to No at the end of the business day or prior to the weekend, the Non-business hours Greeting plays until the receptionist sets the Business Status to Yes.

Have the receptionist or designated Operator change the Business Status to Yes in the morning when your company opens. At the end of the business day, have the Receptionist or designated Operator set the Business Status to No.

### To set the Business Status

- 1 Press    .
- 2 Enter the Operator password and press OK.
 

Pswd:  
RETRY OK
- 3 Press OPER.
 

Choose option  
OPER MODE
- 4 Press NEXT.
 

Atdt avail: Y  
CHNG NEXT
- 5 Press CHNG to toggle between Y and N.
 

Business open: N  
CHNG NEXT
- 6 Press  to end the session.

## Changing greetings or the Business Status from a remote telephone


You can change a greeting or the Business Status from the dialpad of external tone dial telephone. You must do remote administration through the System Administrator Mailbox. For information about remote administration, refer to the *CallPilot Reference Guide*.

## Setting up line answering

CallPilot can answer all your Central Office (CO) lines included in line configuration. You can designate whether or not CallPilot answers your company lines. When Answer Lines is enabled, CallPilot answers the incoming calls and presents each caller with the Company Greeting and the Automated Attendant menu. When Answer Lines is disabled, CallPilot does not answer incoming calls. Your receptionist must answer and route incoming calls.

For more information about line configuration, refer to [“Configuring line answering”](#) on page 52.

### To assign Answer Lines

- 1 Press  9 8 2.

Pswd:  
RETRY OK

- 2 Enter the Operator password and press OK.

Choose option  
OPER MODE

- 3 Press OPER.

Atdt avail: N  
CHNG NEXT

- 4 Press NEXT.

Business open: N  
CHNG NEXT


- 5 Press NEXT.

Answer lines? N  
CHNG NEXT

- 6 Press CHNG.

If you set Answer Lines to N the display shows: **Disabling...**

If you set Answer Lines is set to Y the display shows: **Enabling...**

- 7 Press  to end the session.



## Chapter 14

# Broadcast and Information messages

### About Broadcast messages

You can send a Broadcast message if you need to send a message to every initialized mailbox on your phone system. Broadcast messages play on all mailboxes initialized with CallPilot. You can send a Broadcast message to announce meetings, special company events, and reminders. Sending a Broadcast message eliminates recording and sending the same message several times.

As the System Administrator, you are the only person who can send Broadcast messages. In order to send a Broadcast message, you must know the Broadcast message address.

- If you use the CallPilot interface **9 0 0** is the default Broadcast message address
- If you use the Norstar Voice Mail interface **9** is the default Broadcast message address



**Note:** Broadcast messages are not sent to Information or General Delivery mailboxes.

Follow the procedures that apply to the interface you use.

### To record and send a Broadcast message - Norstar Voice Mail

- 1 Press **6 9 8 1**.
- 2 Enter the System Administrator Mailbox number and password and press **OK** or **#**.
 

Log:  
 QUIT    RETRY    OK
- 3 Enter the Broadcast message address.  
The default Broadcast message address is **9**.
 

0 new    0 saved  
 PLAY    REC    ADMIN
- 4 At the tone, record your Broadcast message and press **OK** to end your recording.
 

Record message:  
 RETRY    PAUSE    OK
- 5 Press **PLAY** to listen to your Broadcast message before sending it  
or  
press **OK** to accept your recording  
or  
press **RETRY** to re-record your Broadcast message.  
Your message is delivered to all initialized mailboxes  
or  
press **☎** or **\*** to cancel sending the Broadcast message.
- 6 Press **☎** to end the session.

## To record and send a Broadcast message - CallPilot

- |   |  |
|---|--|
| <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Mbox:<br/> RETRY <span style="float: right;">OK</span> </div>        | <p>1 Press <span style="border: 1px solid black; padding: 0 2px;">e</span> <span style="border: 1px solid black; padding: 0 2px;">9</span> <span style="border: 1px solid black; padding: 0 2px;">8</span> <span style="border: 1px solid black; padding: 0 2px;">1</span>.</p>  |
| <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Pswd:<br/> RETRY <span style="float: right;">OK</span> </div>        | <p>2 Enter the System Administrator mailbox number and press <u>OK</u> or <span style="border: 1px solid black; padding: 0 2px;">#</span>.</p>   |
| <div style="border: 1px solid black; padding: 2px; width: fit-content;"> To:<br/> NAME SPEC DONE </div>                                       | <p>3 Enter the System Administrator mailbox password and press <u>OK</u> or <span style="border: 1px solid black; padding: 0 2px;">#</span>.<br/>A mailbox summary is announced.</p>   |
| <div style="border: 1px solid black; padding: 2px; width: fit-content;"> EMPTY <span style="float: right;">REC</span> </div>                  | <p>4 Press <u>COMP</u> or <span style="border: 1px solid black; padding: 0 2px;">7</span> <span style="border: 1px solid black; padding: 0 2px;">5</span>.</p>   |
| <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Recording...<br/> REREC <span style="float: right;">OK</span> </div> | <p>5 Enter the Broadcast message address and press <u>OK</u> or <span style="border: 1px solid black; padding: 0 2px;">#</span>.<br/>The default Broadcast message address is <span style="border: 1px solid black; padding: 0 2px;">9</span> <span style="border: 1px solid black; padding: 0 2px;">0</span> <span style="border: 1px solid black; padding: 0 2px;">0</span>.<br/>The Broadcast message address changes if you change the Group List leading digit.</p>   |
| <div style="border: 1px solid black; padding: 2px; width: fit-content;"> Rec stopped<br/> PLAY DEL SEND </div>                                | <p>6 Press <u>REC</u> or <span style="border: 1px solid black; padding: 0 2px;">5</span> and record the Broadcast message at the tone.</p>   |
|   | <p>7 Press <u>OK</u> or <span style="border: 1px solid black; padding: 0 2px;">#</span> to end your recording<br/>or<br/>press <u>REREC</u> to erase and re-record the Broadcast message.</p>  |
|   | <p>8 Press <u>PLAY</u> or <span style="border: 1px solid black; padding: 0 2px;">2</span> to listen to your message<br/>or<br/>press <u>SEND</u> or <span style="border: 1px solid black; padding: 0 2px;">7</span> <span style="border: 1px solid black; padding: 0 2px;">9</span> to send the Broadcast message<br/>or<br/>press <u>DEL</u> or <span style="border: 1px solid black; padding: 0 2px;">7</span> <span style="border: 1px solid black; padding: 0 2px;">6</span> to erase and re-record the Broadcast message.</p> |
|   | <p>9 Press <span style="border: 1px solid black; padding: 0 2px;">☎</span> to end the session.</p>   |

## Information mailbox messages

Your business or departments within your business can use Information mailboxes to provide callers with messages and announcements. You or another person responsible for the Information mailbox can record and update the Information mailbox message.

You can use Information mailbox messages to:

- announce sales
- provide product lists
- announce special events

Make it easy for callers to access Information mailbox messages by mentioning the Information mailbox in the Automated Attendant, or by asking the operator to route enquiries to the Information mailbox.

Callers cannot leave messages in an Information mailbox. Callers automatically disconnect after they listen to an Information mailbox message.

### About recording an Information mailbox message

Before you record an Information mailbox message, you must determine what the message includes. As you prepare the message, be sure to include important times and dates.

For example: *“Paddy’s Dance Studio proudly presents an extravaganza of dance. The entertainment begins at 8:00 pm on the fourth of July. Toddlers tap is in the White Room. Folk dance is in the Green Room. Classical ballet is in the Pink Room. Contemporary jazz is in the Blue Room. The studio and recital rooms are located at 222 Main Street.”*

Write the message down and practice reading it aloud. When you are confident the message includes everything you want it to, record the message. If you use a phone system with bilingual capability, you must record the Information mailbox message in both languages.

An Information mailbox message can be either a Primary or an Alternate mailbox greeting. Use the procedure [“To record an Information mailbox message” on page 112](#) to record an Information mailbox message.

## To record an Information mailbox message

- 1 Press **[\*] 9 8 1**.  
Follow the voice prompts or the display button options to open the Information mailbox. Do not enter your mailbox number or password. Enter the mailbox number and password of the Information mailbox.

- 2 If you use the CallPilot interface:

- Press **[\*] 2** to open the Greetings Options menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[\*]**
- Press **GREET** or **[2]**
- Go to step 3

```
Greeting options
REC  CHOOSE  CFWD
```

- 3 Press **REC** or **[1]**.

```
Greeting:
PRIME  ALT  PERS
```

- 4 Press **PRIME** or **[1]** to record the Primary Information mailbox message  
or  
press **ALT** or **[2]** to record the Alternate Information mailbox message.

```
Record now?
YES  NO  QUIT
```

- 5 Press **YES** or **[1]** and record the message at the tone.

```
Record greeting:
RETRY  OK
```

- 6 Press **OK** or **[#]** to end the recording.

```
Accept greeting?
RETRY  PLAY  OK
```

- 7 Press **OK** or **[#]** to accept the recording  
or  
press **PLAY** or **[1]** to listen to the greeting  
or  
press **RETRY** or **[2]** to rerecord the greeting.

- 8 Press **[\*]** to end the session.



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## Chapter 15

# Troubleshooting CallPilot

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This chapter describes problems that can occur when you operate CallPilot, and suggested solutions.

### **The Automated Attendant does not answer calls**

- Verify that you have assigned the lines to the Greeting Table, and the Answer Mode for the line is Auto-Attendant. This means that CallPilot 150 or Business Communications Manager 2.5 is set to answer the line.
- All the channels can be busy. Try calling back. Your call is answered when a channel is available.
- Verify that greetings 1 to 8 are recorded. These greetings default to the Greeting Tables and must be recorded for the Automated Attendant to operate. Refer to [“Setting up a Greeting Table” on page 48](#).
- If the channels are frequently busy, it indicates there is too much activity. Contact your advice line or sales representative.

### **CLID information is lost**

The Automated Attendant must be set to answer after two or more rings for CallPilot Manager to record call log information related to an incoming call. For information about setting the number of rings, refer to [“Configuring line answering” on page 52](#).

### **The Automated Attendant transfers some callers to the General Delivery Mailbox**

The system requires a tone dial telephone signal and a minimum voice level. The system waits for a caller to respond. If a response is not received, the caller is transferred to the Receptionist or designated Operator. If they are not available, the caller is automatically transferred to the General Delivery Mailbox. The caller is transferred to the General Delivery Mailbox if an extension does not have a mailbox.

For the system to transfer calls correctly, each mailbox must have a unique extension number. To verify that mailboxes have a unique extension number, print the Directory Report.

### **Greetings play at the wrong time of day**

There are four possible causes for this problem:

- The Business Open setting is not selected. Select the Business Open check box. Refer to [“Changing the Business Open setting” on page 101](#) for information.
- The wrong greeting numbers are assigned to the Greeting Table.
- The business hours are set incorrectly.
- The system time and date are incorrect for your telephone system.

### **Greetings play on the wrong line**

If you find the information is incorrect, you must reassign lines to the Greeting Table. Refer to [“Configuring line answering” on page 52](#).

### **A telephone cannot be forwarded to the system**

If you try to forward your incoming calls to the system and the display shows **Forward denied**, it is possible that you are forwarding to the wrong extension number. Use Feature 985 to display the correct extension number for the system, and compare this number to the extension that your telephone is forwarded to.

### **Feature 981 produces a Log prompt on the telephone display**

Whenever the Log prompt appears on the display, it can be caused by the telephone not having an assigned mailbox. If the extension does not have an assigned mailbox, CallPilot 150 or Business Communications Manager 2.5 requests both a mailbox number and a password.

### **A subscriber cannot reply to an external caller or use Off-premise Message Notification or Outbound Transfer**

An Outdial type must be assigned before a subscriber can reply to an external caller using the Reply feature or use Off-premise Message Notification or Outbound Transfer. Before a subscriber can reply to a message from an external caller, an Outdial type must be assigned.

The default for Outdial type is None. Until you assign a line or line pool as the Outdial type for a mailbox, the mailbox owner can use the Reply feature to return calls from internal extensions only, Off-premise Message Notification for internal extensions only and Outbound Transfer for internal extensions only.

### **Telephone extension and mailbox numbers are different lengths**

For CallPilot Manager to work properly, the mailbox number length must match the extension number length assigned to the system. If the extension number length is changed on the system, you must re-initialize and reprogram CallPilot.

### **You cannot access a line or a line pool**

Check that your system supports the feature you are trying to use. If calls are not completed when you try to reply to a CLID message or reach an Off-premise Message Notification number, ensure Outdialing is assigned, is available and is correctly configured. For more information refer to your system documentation.

### **Personalized greetings do not play**

Personalized greetings do not play if a telephone is on Call Forward Busy or Call Forward All Calls to the CallPilot extension number. If you use analog lines and a telephone is CFB or CFAC, Personalized greetings depend on the CLID information that is received prior to the second ring. Personalized greetings do not play if the Auto Attendant is set to answer at 0 or 1 ring. The Primary or Alternate Personal Mailbox Greeting plays instead. Change the number of rings to 2 or more.

**Mailboxes do not accept messages**

A mailbox does not accept messages if:

- it is not initialized
- CallPilot message storage capacity is full

**Messages are removed from a mailbox**

If messages are being removed, check the message retention period in the mailbox Class of Service. To check the Class of Service, refer to [“Editing a Class of Service” on page 36](#).

**A mailbox owner lost the mailbox password**

A forgotten password cannot be recovered. The password associated with the mailbox must be reset to the default password 0000. After a password has been reset to the default, the mailbox owner must change it in order to use the mailbox. To reset a password, refer to [“Changing mailbox settings” on page 35](#).

**A mailbox owner cannot access their mailbox**

Each mailbox is assigned a maximum number of incorrect password attempts in its Class of Service. CallPilot records the number of incorrect attempts from the last time the mailbox was successfully accessed. If the number is exceeded the mailbox owner is “locked-out” and hears the message *“This mailbox is locked to prevent unauthorized access. Contact your administrator for assistance.”* The mailbox cannot be opened again until the you reset the password. To reset a password, refer to [“Changing mailbox settings” on page 35](#).

**A mailbox is not in the Company Directory**

Verify the mailbox is initialized. If the mailbox is not initialized, it does not appear in the Company Directory. Verify the Company Directory property for the mailbox is set to Yes. Refer to [“Changing mailbox settings” on page 35](#).

**Calls are answered by the wrong mailbox**

Verify the correct extension is assigned to the mailbox.

**A mailbox cannot be added to CallPilot Manager**

Ensure that the mailbox is not already added. Mailbox numbers must be unique. Check that the number of mailboxes on your system has not been exceeded. If you have not exceeded the number of mailboxes on your system, you can purchase a software authorization code to add more mailboxes. On CallPilot 150 you can have a maximum of 100 subscriber mailboxes. On Business Communications Manager 2.5 you can have a maximum of 998 subscriber mailboxes.

**Incomplete messages are received in a mailbox, or “Message delivered” plays while recording a message or a CallPilot session ends unexpectedly**

These situations can be caused by a problem called Talk Off. Talk Off occurs if CallPilot interprets certain voice patterns as Dual Tone Multi Frequency (DTMF) dialing tones. DTMF dialing tones are produced when buttons are pressed on a touch dial telephone. When you press a button on the dialpad, CallPilot receives a DTMF dialing tone and performs the correct operation. For example, after you enter your mailbox password, you can press the  button. The DTMF dialing tone sent to CallPilot indicates you have finished entering your password.

Some voice patterns are the same as DTMF dialing tones. This can make CallPilot function incorrectly. For example, if in the middle of a message you say something that sounds like a DTMF dialing tone created by pressing the  button, the recording session ends. Correcting Talk Off requires adjustments to your CallPilot system. Call your advice line for more information.

**You cannot create a Group List**

The maximum number of Group Lists that can be created is 99. The CallPilot Group List must be enabled during installation. If the Group List feature is not enabled, you cannot create a Group List.

**CallPilot does not accept a Path number for a CCR Tree**

If you enter an incorrect digit while assigning a Path number, an error message appears. The possible causes are:

- you entered an incorrect Path number. You can use only numbers 1 through 8 as Path numbers. Do not use 0 or 9 as Path numbers.
- you attempted to exceed the maximum number of Paths.
- you are trying to access a level of a Tree whose previous level does not include a Menu node. You must add a Menu node to the first level to let callers move to the second level.

**A CCR Tree cannot be deleted**

A Tree cannot be deleted while it is in use. You must disable the Tree before you can delete it.



**Note:** For more information about deleting the Tree, refer to [“Deleting a CCR Tree” on page 75](#).

---

**Leave Message mailbox for a CCR Tree is full**

The mailbox is equipped with a Never Full Mailbox feature, which lets a caller leave a message in the mailbox, even if the mailbox is “full”. The message is stored, but cannot be accessed until the mailbox owner deletes some of the messages in the mailbox.

If more message time is required, you can change the mailbox Class of Service. For more information, refer to [“Editing a Class of Service” on page 36](#).

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## Chapter 16

# CallPilot configuration tips

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This chapter describes system configuration enhancements that maximize the efficiency of CallPilot.

### Delayed answering by the Automated Attendant

The Automated Attendant can answer any call on specified Central Office (CO) telephone lines after a specified number of rings. CallPilot answers incoming calls if the Installer programs CallPilot to be the prime telephone for one or more designated CO lines. The Delay Ring Transfer (DRT) feature transfers unanswered calls on these lines to the Automated Attendant after the specified number of rings.



**Note:** DRT applies only to incoming calls on the assigned line. It does not affect extension calls between telephones.

---

### Ringling lines and answer buttons

If two or more telephones have a ringing line appearance of the same incoming telephone line, and one of these telephones is programmed with the Call Forward All Calls (CFAC) or Call Forward No Answer (CFNA) features, incoming calls on the incoming telephone line are directed to the mailbox of the programmed telephone.

For example, if a marketing receptionist's telephone has a ringing line appearance of the marketing director's telephone, and the receptionist's telephone is call forwarded to CallPilot, incoming calls transfer to the receptionist's mailbox. This is also true if the receptionist's telephone is CFNA to CallPilot and the number of specified rings on the receptionist's telephone is fewer than the specified rings on the marketing director's telephone.



**Note:** CFAC and CFNA do not affect calls on a telephone's non-ringing lines. For example, if a receptionist's telephone has a non-ringing appearance of another telephone's CO line, and the receptionist's telephone is CFAC or CFNA to CallPilot, incoming calls on this line are not affected.

---

### Ringling Answer button

If one or more telephones have a Ringling Answer Button for another telephone, and one of these is CFAC or CFNA to CallPilot, all incoming calls go to the mailbox of the call forwarded telephone.

If two or more of these telephones are CFAC to CallPilot, all calls go to the mailbox of the telephone that is connected to the lowest numbered station port on the system.

## Using Call Forward All Calls (CFAC) and Call Forward No Answer (CFNA)

If a subscriber does not want to take any calls for a period of time, they can forward their telephone to their mailbox using CFAC. When forwarded, all calls to the mailbox owner's extension transfer to their mailbox.

To call forward to a mailbox, press    .

To cancel call forward:

Press   .

or

press CANCEL

or

press .



**Note:** If you use CFAC, you cannot have any lines or answer DN's programmed to ring at your set because these calls will go to your mailbox.

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## How to set up CallPilot for different businesses

There are several ways to set up CallPilot in your company. How you set up CallPilot depends on whether you use a Business Communications Manager or Norstar telephone system, and how many CO lines you use.

Here are examples of CallPilot configurations for a small and a medium company, and some useful application tips.

### CallPilot for a small business

#### On Your Toes Dance Studio

CallPilot is the Call Forward No Answer (CFNA) extension for all the telephones in the office. This means that any call that is not answered by a mailbox owner transfers to their mailbox.

Each mailbox owner has buttons programmed on their display telephone for the CallPilot Leave Message feature (☎ 9 8 0) and the Open Mailbox feature (☎ 9 8 1). This gives easy access to these frequently used features.

Employees have a mailbox number that is the same as their telephone extension. All mailbox owners have initialized their mailbox and recorded a Personal Mailbox Greeting.

#### The central receptionist

The On Your Toes Dance Studio's receptionist handles all calls from the studio's published telephone number. If the receptionist does not answer the telephone within four rings, the Automated Attendant answers the call. The receptionist is also the Norstar designated Operator. Whenever a caller presses 0 to speak with the operator, the call transfers back to the receptionist.

Here is how On Your Toes Dance Studio's communication system works.

The On Your Toes Dance Studio's public telephone number is 555-2468. The studio subscribes to custom calling services from the telephone company. This number forwards to any available (non-busy) line in a group of six lines. All six lines appear on the receptionist telephone.

CallPilot is the Prime Set for each of the six lines. The Delayed Ring Transfer (DRT) feature is set to forward unanswered lines to the Automated Attendant. The DRT to Prime is set to Yes, and the DRT Delay is set to four.



**Note:** Delayed Ring Transfer is a system-wide call handling feature. All lines programmed as DRT to Prime are forwarded after four rings. This is done by setting the Prime Set of the line to the CallPilot extension.

---

## Greeting Table 1 for On Your Toes

<b>Greeting 1</b>	<p><i>“Good morning. You have reached On Your Toes Dance Studio. The studio is closed at this time. Stay on the line to leave a message.”</i></p> <p>The CallPilot voice prompts play after the greeting. You can make Company Greetings up to five minutes long.</p>
<b>Greeting 2</b>	<p><i>“Good afternoon. You have reached On Your Toes Dance Studio.”</i></p>
<b>Greeting 3</b>	<p><i>“Good evening. You have reached On Your Toes Dance Studio.”</i></p>
<b>Greeting 4</b>	<p><i>“You have reached On Your Toes Dance Studio. The studio is closed at this time. Stay on the line to leave a message.”</i></p>

CallPilot uses Greeting Table 1 to answer calls after four rings. Depending on the time of day, different recorded greetings play for Morning, Afternoon, and Evening. When the Business Status is No, the Non-business Hours Greeting plays.



**Note:** Lines must be assigned to a Greeting Table before the Greeting Table greetings are used.

## The Costume Room

The Costume Room has one telephone with a CallPilot mailbox. Calls are directed to the Costume Room Attendant by the receptionist or the Automated Attendant. When the Attendant is not available, the caller is forwarded to the Costume Room mailbox. The mailbox primary message says:

*“You have reached the Costume Room. No one is available to take your call. Please leave your name and number and a brief message after the tone and we will return your call as soon as possible.”*



## CallPilot for a medium business

### Bridge Stone Engineering

CallPilot is assigned as the Call Forward No Answer (CFNA) extension for all telephones in the office. This means that any call that is not answered by a mailbox owner transfers to their mailbox.

Subscribers have buttons programmed on their display telephone for the CallPilot Leave Message (   ) and Open Mailbox (   ). This gives easy access to these frequently used features.

Employees have a mailbox number that is the same as their telephone extension. Subscribers have initialized their mailbox and recorded a Personal Mailbox Greeting.

When the receptionist is not available, callers use Custom Call Routing to route their call along a call path.

### The central receptionist

Bridge Stone's receptionist handles all calls from the published telephone number. When the receptionist is unable to answer the telephone within four rings, the Automated Attendant answers the call. The receptionist is also the designated Operator. When a caller presses  to speak with the operator, the caller transfers to the receptionist.

Here is how Bridge Stone's communication system works.

Bridge Stone's public telephone number is 123-1234. All lines appear on the receptionist's telephone. CallPilot is the Prime Set for each of the six lines. The Delayed Ring Transfer (DRT) feature forwards unanswered lines to the Automated Attendant.



**Note:** Delayed Ring Transfer is a system-wide call handling feature. All lines programmed as DRT to Prime are forwarded after four rings. This is done by setting the Prime Set of the line to the CallPilot extension.

---

## Greeting Table 1 for Bridge Stone Engineering

<b>Greeting 1</b>	<i>“Good morning. You have reached Bridge Stone Engineering.”</i> The CCR Home Menu plays after the greeting. You can make Company Greetings up to five minutes long.
<b>Greeting 2</b>	<i>“Good afternoon. You have reached Bridge Stone Engineering.”</i>
<b>Greeting 3</b>	<i>“Good evening. You have reached Bridge Stone Engineering.”</i>
<b>Greeting 4</b>	<i>“You have reached Bridge Stone Engineering. The office is closed at this time. Stay on the line to leave a message.”</i>

CallPilot uses Greeting Table 1 to answer calls after four rings. Depending on the time of day, different recorded greetings play for the Morning, Afternoon, and Evening. When the Business Status is No, the Non-business Hours Greeting plays.

Greeting Table 1 answers calls using greetings 1 through 4. Greetings 1 through 4 play unless you assign different greetings. When the Greeting Table was configured, English was chosen as the Primary Language.



**Note:** Lines used must be assigned to the Greeting Table before the Greeting Table greetings are used.

After the Company Greeting the CCR Home Menu voice prompt plays. This menu gives callers a list of single digit options. After callers listen to the Home Menu, they select an option by pressing a number on any tone dial telephone. For example:

*“To speak to our customer service representative, press 1. To reach our sales department, press 2. To reach our shipping and receiving department, press 3. To speak with our receptionist, press 0.”*

## The Customer Service and Sales department

This department has two receptionists, two customer service representatives, two sales agents, a sales manager, and a customer service manager. CallPilot is set up to answer all calls. Callers can select either customer service or sales from the CCR Home Menu voice prompt.

Incoming calls for customer service transfer directly to the customer service receptionist.

Incoming calls for sales transfer directly to the sales receptionist.

## The managers

Bridge Stone managers have a personal CO line that appears on their private telephone and their receptionist's telephone. The receptionists answer the managers' calls, and then transfer the calls to the manager's telephone.

If a manager is unavailable to take a call, the call rings back at the receptionist's set. The receptionist handles the call by asking the caller to leave a voice message in the manager's mailbox. If the caller wants to leave a message, the receptionist transfers the caller using the CallPilot Transfer feature .

When CallPilot is set up this way, CFNA for the manager's set is not used. The receptionist answers the manager's calls and uses CallPilot's Transfer feature to transfer the caller to the manager's telephone. The CallPilot Transfer Callback Feature returns the call to the receptionist's telephone if a manager is not available to take a call.



**Note:** The receptionist's telephone has a ringing line appearance. This telephone cannot be forwarded to another telephone.

---

## Shipping and Receiving

The employees in this department share the same telephone. This department uses one telephone line that is assigned to the loading dock. This line is assigned to Path 3 of the CCR Home Menu.

The shipping and receiving department mailbox greeting informs callers they can leave a message or press  to speak with the receptionist.

## Feature compatibility

This section describes how system features interact with CallPilot.

### ATA 2 and ASM

One or more analog single-line sets can be connected to telephone system using an Analog Terminal Adapter or an Analog Station Module. This type of set works with DTMF tones to allow access to CallPilot options through the dialpad only. Rotary dials cannot be used internally with CallPilot.

### Answer buttons

For information about Answer Buttons, refer to [“Ringing Answer button” on page 117](#).

### Autodial (internal)

To determine the CallPilot extension, press    .

You can use autodial for Busy Lamp Field (BLF) indication for all voice channels. This allows CallPilot channels to be monitored during busy periods.

### Automatic Set Relocation

Must be set to No when changing the CallPilot extension and connections between the Norstartelephone system.

### Call Forward All Calls (CFAC)

Any ringing line or answer button appearance on a set forwards to the extension specified by the call forwarded. If CFAC is used a caller immediately transfers to the mailbox of the CFAC extension.

### Call Forward No Answer (CFNA)

Any ringing line appearance on a set is CFNA to the extension specified after the programmed number of rings.

CFNA is not applicable in an Automated Attendant application. If Delayed Ring Transfer (DRT) is being used for CallPilot answering, ensure that the number of rings for CFNA on any of the sets is equal to or higher than the number of rings for DRT.

CFNA takes precedence over DRT and Transfer Callback if it has a lower number of rings.

### Camp On

The Camp On feature cannot be used to access CallPilot. If a caller calls the extension and there is no answer, the caller cannot invoke the Camp On feature. Advise the caller to wait a few moments and try the CallPilot extension again.

### Delayed Ring Transfer (DRT)

To use CallPilot as a secondary line answering position, set DRT:

- 1 Assign the CallPilot extension as the prime extension for the specified lines that are to be DRT to CallPilot.
- 2 Set DRT to Yes.
- 3 Set DRT Delay from one to six rings.
- 4 Assign a Greeting Table to each line that is to be DRT to CallPilot.
- 5 Set the CallPilot Answer option to No for the lines that are DRT to CallPilot.



**Note:** If DRT is used for CallPilot Answering, and telephones with a ringing line appearance forward to CallPilot, a caller immediately transfers to the mailbox of the CFAC set.

---

### Disconnect Supervision

With Line Disconnect Supervision, if a caller hangs up after reaching the Automated Attendant, CallPilot immediately breaks the connection. Disconnect Supervision results in fewer ‘phantom’ messages in the General Delivery Mailbox and prevents CallPilot ports from being occupied.

### Do Not Disturb (DND)

Stops all tones and ringing to a set. When a call transfers to a set with DND activated, the call appears as a flashing indicator on an available line. The Automated Attendant transfers the caller to the mailbox associated with the telephone.

### Hold

A mailbox owner cannot put a session on hold. If the hold button is pressed during a CallPilot programming session, CallPilot disconnects, except if Automatic Hold is used to transfer a caller to a mailbox or an extension. CallPilot ignores Held Line Reminder tones.

### Intercom Numbers

Inside callers can access CallPilot by pressing an intercom button and entering the extension. Access to the CallPilot feature codes and “*Message for you*” indication requires an intercom button on the set.

An intercom button is required to notify an extension of an incoming transfer.

### Language choice

The CallPilot language capability is independent of the telephone system’s language selection for a set. CallPilot language availability is determined by the Class of Service assigned to a mailbox.



**Note:** The CallPilot language option is enabled after a subscriber starts a session.

---

**Lines**

If a line programmed for the Automated Attendant appears on a set, it rings when CallPilot transfers the call. If a line programmed to be answered by the Automated Attendant does not appear on a set, a call is transferred to an intercom line appearing on the intercom button.

**Message Send/Reply/Waiting**

Any message notification left by an internal caller can be replied to using the CallPilot message reply options. After listening to a message, a subscriber can forward a copy of the message to another mailbox or call the sender of the message.



**Note:** If a subscriber replies to a message from a one line display phone (M7100, T7100, M7208 or T7208), the subscriber must press **9** after listening to the message.

---

**Night Service**

When Night Service is activated and the CallPilot prime extension is specified as the Night Ring extension for an incoming line, a caller immediately hears the CallPilot Automated Attendant.

**Prime Set (multiple)**

When configuring lines, CallPilot can be designated as the prime extension. CallPilot answers with the Automated Attendant.

**Private line**

When private lines are assigned to a set programmed to ring, CFNA to CallPilot is answered by the set's mailbox. If a private line is the only appearance on that set, CallPilot transfers calls through the intercom button.



**Note:** If the private line is not programmed to ring, CFNA is not activated.

---

**Ringing line preference**

Ringing lines programmed to telephone extensions are recognized by CallPilot. Features such as CFNA and CFAC to CallPilot are not recognized by non-ringing lines programmed to a telephone extension. Refer to [“Call Forward No Answer \(CFNA\)” on page 124](#), [“Call Forward All Calls \(CFAC\)” on page 124](#) and [“Answer buttons” on page 124](#).

**Selective Call Forward**

Refer to [“Do Not Disturb \(DND\)” on page 125](#).

**Service Modes**

With the Service Modes feature you can program the telephone system to forward all incoming calls to CallPilot during specific time periods such as lunch time or non-business hours. CallPilot answers with the Automated Attendant.

**Transfer Callback**

Calls through the Automated Attendant that transfer to an extension without CFNA are routed by Transfer Callback to CallPilot after the designated number of rings. The CFNA/Transfer Callback feature is programmed so that calls with the fewest rings take precedence.

## Appendix

### Default configuration values

This appendix is a summary of the values that you can enter at the prompts that occur throughout this guide. The tables include the range or values that can be entered and, where applicable, the default setting.

	Value	Default
System Administrator password	four - eight digits	0000 (four zeros)
Special mailbox types:	two - seven digits	two digits *
General Delivery Mailbox	10 1000000	10
System Administrator Mailbox	12 1000002	12
Automated Attendant extension	any valid CallPilot extension	none
CO Line Greeting assignment:	1 - 500	none
Line number		
Greeting Table:	1 - 4	1
Number of rings	0 - 12	0
Greeting used:		
Morning	1 - 40	1
Afternoon	1 - 40	2
Evening	1 - 40	3
Non-Business	1 - 40	4
Language		Primary

\*If the Group List leading digit is 1, the Special Mailboxes default to 20 and 22. The extension number length defaults to the Norstar telephone system extension 1 number length. For more information, refer to the Installation Guide for your system.

	Value	Default
Extension/mailbox:		
Extension leading digit	0 - 9	
Digits in extension	two - seven digits	
Mailbox leading digit	0 - 9	
Digits in mailbox	two - seven digits	

	Value	Default
Number of subscriber mailboxes:		
CallPilot 150	100	20
Business Communications Manager 2.5	998	depends on software package
Class of Service	1-16	Refer to <a href="#">"Class of Service default values"</a> on page 23
Group Lists:		
Group List number **	001 - 099 - 901-999	901 - 999
Number of members	1-125	0









\*\*Group List numbers are always three digits long

Hardware Specifications	CallPilot 150
Number of ports	1 to 2
Number of voice channels	4
Message storage	96M 24 hours default 192M 60 hours upgrade

	Value
Response time at the Home Menu	2.5 seconds
Number of Trees	8
Number of levels	11
Number of Paths per level	8



Group List leading digit	Group List range
0	001 - 099
1	101 - 199
2	201 - 299
3	301 - 399
4	401 - 499
5	501 - 599
6	601 - 699
7	701 - 799
8	801 - 899
9	901 - 999

Feature code name	Dialpad buttons	Description
Leave Message	 9 8 0	Leaves a message in a mailbox. No password is required.
Open Mailbox	 9 8 1	Opens your mailbox to play your messages and to access mailbox options.
Call Forward	 9 8 4	Forwards incoming calls to your mailbox.
CallPilot extension	 9 8 5	Displays the voicemail extension number on your phone.
Transfer	 9 8 6	Transfers calls to a mailbox on the CallPilot system.
Interrupt	 9 8 7	Intercepts a caller who is listening to your mailbox greeting or leaving a message.
Name Dialing	 9 8 8	Lets you dial calls by searching the Company Directory.
Call Record	 9 8 9	Records a call and stores it in your mailbox.



---

## Glossary

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**AA**

See *Automated Attendant*.

**Administration**

The tasks involved in maintaining CallPilot mailboxes, Greetings, set up and configuration. Administration also involves setting up and maintaining CCR Trees.

**Alternate extensions**

When a caller dials an extension that is programmed to have one or more alternate extensions, CallPilot rings at all of the sets simultaneously. The first set to answer accepts the call. The other sets cannot access the line or use the Interrupt feature (☐☐☐☐) to access the answered line.

Alternate extensions are available only on Subscriber mailboxes.

**Alternate Greeting**

An alternate greeting that a subscriber records for an exceptional occasion, such as an absence.

**Alternate Language**

An alternate language used for greetings and prompts. To use an alternate language, you must enable the Bilingual Option. The alternate language cannot be the same as the primary language.

**Attendant sign ON/OFF**

A task performed by a company Receptionist or designated Operator that indicates to CallPilot when an Operator is available to answer calls.

**ATA 2**

A Nortel Networks product that connects an analog device such as a single-line telephone or a fax machine to a Business Communications Manager 2.5 or CallPilot 150 system.

**Automated Attendant**

The CallPilot answering service that answers incoming calls with a Company Greeting, plays a list of options to a caller, and performs call routing functions in response to caller selections.

**Blind Call**

An incoming call that transfers directly to the extension requested.

**Broadcast Message**

A message that can be sent by the System Administrator. Broadcast messages play on all mailboxes initialized with CallPilot. Broadcast messages are not sent to Information or General Delivery mailboxes.

**Business Status**

A setting that overrides the schedule of the Greeting Table and plays the Non-business greeting until turned off.

**Call Screening**

If you change the mailbox transfer option to Screened, subscribers can listen to a recording of the caller's name before accepting a call.

**CCR**

See *Custom Call Routing*.

**Channel configuration**

The number of channels on the CallPilot unit designated for outdialing.

**Class of Service**

A Class of Service (COS) defines the values for the special features of a mailbox. When you add a mailbox you choose a Class of Service that provides the level of service appropriate for the subscriber. A mailbox cannot be added without a Class of Service.

**Company Directory**

An internal list of the names of subscribers with initialized mailboxes designated to appear in the directory.

**Configuration**

The tasks involved in setting up CallPilot. For example, configuring the Central Office (CO) lines answered by CallPilot.

**Configuring CallPilot lines**

The tasks involved in determining which external lines are answered by CallPilot and which Greeting Table is assigned.

**COS**

See *Class of Service*.

**Custom Call Routing**

Call Paths that let callers select options to direct their calls along paths you create.

**Default**

The parameters preset for CallPilot.

**Destination**

On a CCR Tree, the Destination determines where callers are directed after they listen to information or leave a message in a mailbox. The Destination types are:

- Previous: returns the caller to the Previous menu
- Home: returns the caller to the Home Menu
- Disconnect: disconnects the call

**Display**

A one-line or two-line display on the business telephone that shows CallPilot commands and options.

**Display buttons**

The three buttons that appear below the display on a two line display telephone. When pressed, these buttons select the specified CallPilot option.

**Display options**

The choices that appear on the display of a two line display. Options that appear on the display can be selected using the display or dialpad buttons.

**Envelope information**

A date and time stamp that appears on all messages left in a mailbox. When a message is left by another mailbox owner, envelope information includes the message sender's name.

**Extensions**

A two to seven-digit number that is used to reach a designated telephone. The extension length ranges from two to seven digits.

**Feature code**

A unique three-digit code used to access CallPilot features and options.

**General Delivery Mailbox**

One of the two Special Mailboxes that hold messages for individuals who are not assigned a Subscriber mailbox. The other Special Mailbox is the System Administrator Mailbox.

**Greetings**

There are three types of CallPilot Greetings: Company Greetings, Personal Mailbox Greetings and Information mailbox Greetings. Company Greetings are played by the Automated Attendant to incoming callers. Personal Mailbox Greetings are played to callers who want to leave a message in a selected mailbox. Information mailbox Greetings are played to describe goods or services available to callers.

**Greeting Tables**

A table for storing recorded Company Greetings, start times assigned to the greetings, and the lines that are answered by CallPilot. There are four Greeting Tables.

**Group Lists**

A collection of mailbox numbers that are assigned a special Group number by CallPilot. When a message is sent to a Group List, all the mailboxes in the list receive the message.

**Guest mailbox**

A type of Subscriber mailbox you can assign to people who do not have a permanent extension, but require a mailbox. These mailboxes receive and store messages the same way that Subscriber mailboxes do.

**Home Menu**

The first CCR menu callers encounter after they hear the Company Greeting. The Home Menu provides a list of single-digit options to a caller. After callers listen to the Home Voice Menu they select an option by pressing a keypad number on their telephone.

You can program Home Menu to offer up to eight options. By default,  is reserved for reaching the Operator, and  offers the menu in the Alternate Language. The Home Menu can also be an Information Message that plays an announcement to callers and then disconnects the call when the announcement is finished.

**Home Menu Voice Prompt**

A voice prompt that provides a list of number options. When pressed, these options can route a caller to a sub-menu, an Information Message, a Leave Message option, or a transfer to an extension.

**Information mailbox**

A mailbox that plays an informative message to callers. The message can describe goods or services available from your company. The Information mailbox does not store messages and does not have an extension associated with it.

**Information Message**

On a CCR Tree, an Information Message is a message you record to provide a caller with information about goods or services available from your company. You must create an Information mailbox before you can add the Information Message option to a CCR Tree.

**Initializing a mailbox**

Preparing a mailbox to receive messages. Initializing a mailbox includes changing the mailbox default password, recording a Company Directory name and recording Personal Mailbox Greetings.

**Initializing CallPilot**

Specifying the CallPilot settings for mailbox number length and language preference.

**Leave Message**

Feature 980, the feature code used to leave messages in CallPilot mailboxes.

**Leave Message option**

The Leave Message option on a CCR Tree provides callers with access to a mailbox so they can leave a message. When they select this option, the caller automatically transfers to a mailbox to leave a message.

**Level**

The Home Menu is on Level 0. As sub-menus are added, the caller progresses through the levels of the CCR Tree. A total of 10 levels can be created (from 0 to 9).

**Mailbox**

A storage place for messages on the CallPilot system.

**Mailbox number length**

The number of digits allowed in a mailbox number. The mailbox number length ranges from two to seven digits.

**Mailbox properties**

Optional parameters in addition to the Class of Service values. Mailbox properties are: Include in Company Directory, Alternate extensions, Express Messaging Line, Call Screening, Message Waiting Notification, and Outdial type.

**Menu**

A voice prompt you record that provides a caller with a list of up to eight options. There is one default pre-recorded menu, the Automated Attendant Menu, that plays after the Company Greeting. You can replace this default menu with a custom menu, or you can assign the CCR Home Menu to play instead of an Automated Attendant menu.

**Message Delivery Options**

Message sending options that are stamped onto a message. A Message Delivery Option can be assigned to a message after it is recorded.

The Message Delivery Options for the Norstar Voice Mail interface are Normal, Certified, Urgent, Private and Timed. The Message Delivery Options for the CallPilot interface are Normal, Urgent, Private, Acknowledge and Timed.

**Message Waiting Notification**

Message Waiting Notification provides subscribers with the message notification “Message for you” on the display of their telephone. This feature is a Mailbox property that is not controlled by a Class of Service.

**Never Full Mailboxes**

The Never Full Mailbox feature lets a caller leave a message in a Subscriber mailbox, even if the mailbox is “full”. The message is stored, but cannot be accessed until the subscriber deletes at least one saved message.

**Off-premise Message Notification**

Off-premise Message Notification lets subscribers direct their messages to any telephone number, extension or to a pager. This feature is part of the Class of Service.

**Operator**

The Operator is the person whose extension rings when a caller is prompted by the Automated Attendant to “Press  for an operator”. If the Operator is not available, callers who request the Operator transfer to the General Delivery Mailbox.

In Class of Service, the Operator is called the Target Attendant.

**Operator default extension**

The Receptionist or CallPilot designated Operator’s default extension. This default is preset to none, and must be changed to any valid extension on the system.

**Operator Status**

The Operator Status setting tells the system whether a Receptionist or designated Operator is available.

**Option**

A CallPilot choice that is given to a caller through voice or display prompts.

**Outdial type**

The Outdial type determines which line or line pool the system uses for Off-premise Message Notification, Outbound Transfer, or when a mailbox owner replies to a message left by an external caller.

**Password**

A four- to eight-digit number that is entered on the dialpad. A password is used to open mailboxes or perform configuration tasks.

**Path**

A Path is the course an incoming call takes to or through one or more menus on a CCR Tree to reach a destination.

**Path number**

An identification number assigned to a Path on each CCR Tree. The number represents the sequence of digits that callers enter to route themselves along the Path.

**Subscriber mailboxes**

Subscriber mailboxes:

- are assigned to subscribers by the System Administrator
- include Guest mailboxes
- are maintained by the mailbox owner (subscriber)
- can be listed in the Company Directory under the mailbox owner’s name
- are protected by a password that the subscriber can change, or can be reset to 0000 by the System Administrator if the subscriber forgets the password



**Primary Greeting**

The main greeting played to callers.

**Programmable memory buttons**

Buttons on display telephones that can store feature codes and numbers.

**Reports**

The Reports used to view CallPilot programming, the amount of available message storage time, and CCR programming and administration.

**Resetting passwords**

A System Administrator task that changes a mailbox password from its current password back to the CallPilot default password of 0000.

**Resetting CallPilot**

Returning CallPilot to its default settings.

**Special Mailboxes**

The two mailboxes used by the System Administrator and designated Operator. The Special Mailboxes are the System Administrator Mailbox and the General Delivery Mailbox.

**Sub-menu**

A sub-menu is any menu presented to the caller after the Home Menu. Sub-menus can lead to other sub-menus. A total of nine sub-menus can be added to a CCR Tree.

**Subscriber**

A subscriber is a mailbox owner. Subscriber mailboxes include Guest mailboxes.

**System Administrator**

The person responsible for configuring, updating, and maintaining the CallPilot system.

**System Administrator Mailbox**

One of the two Special Mailboxes. It is used by the System Administrator for sending Broadcast Messages.

**Target Attendant**

The Target Attendant is assigned to answer a telephone when a caller opens a mailbox to leave a message and presses  to reach the Operator.

**Tone dial telephone**

A push button telephone that emits DTMF tones.

**Transfer**

On a CCR Tree, a Transfer prompt provides a caller with access to an extension or an external number an extension or an external number. A Transfer prompt is assigned a one-digit number that appears in a menu. When this number is pressed, the caller automatically transfers to an extension or external number.

**Voice prompts**

The prerecorded voice instructions that play when callers access CallPilot features and options. Voice prompts can guide callers along the call Path of a CCR Tree.

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