

Part No. P0607188 02

CallPilot 100/150

Desktop Messaging Quick Reference Guide

NORTEL
NETWORKS™

Welcome to

CallPilot Desktop Messaging

With CallPilot Desktop Messaging from Nortel Networks you can access your CallPilot mailbox from your personal computer. You can manage all your voice messages in one graphical interface. You can still access your mailbox from your telephone at any time.

With CallPilot Desktop Messaging you can:

- ◆ *listen to voice messages*
- ◆ *record and send voice messages*
- ◆ *forward and reply to voice messages*
- ◆ *add message options such as urgent and private*
- ◆ *change your CallPilot password*

Refer to the online Help available with CallPilot Desktop Messaging for detailed information not covered in this guide.

Contents

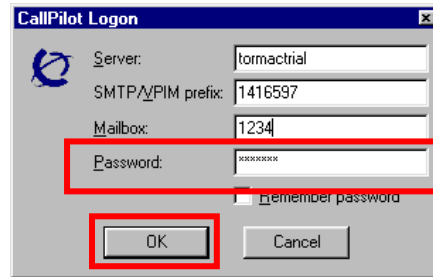
Welcome to CallPilot Desktop Messaging	1
Logging on.....	3
Changing your CallPilot password.....	4
Microsoft Outlook	
CallPilot Desktop Messaging for Microsoft Outlook.....	6
Playing a message.....	7
Recording a message.....	8
Forwarding and replying to a message.....	9
Adding attachments.....	9
Addressing a message.....	10
Setting message options.....	11
Deleting a message.....	11
Lotus Notes	
CallPilot Desktop Messaging for Lotus Notes.....	12
Playing a message.....	13
Recording a message.....	14
Forwarding and replying to a message.....	15
Adding attachments.....	15
Addressing a message.....	16
Setting message options.....	17
Deleting a message.....	17
Novell GroupWise	
CallPilot Desktop Messaging for Novell GroupWise.....	18
Playing a message.....	19
Recording a message.....	20
Forwarding and replying to a message.....	21
Adding attachments.....	21
Addressing a message.....	22
Setting message options.....	23
Deleting a message.....	23
Internet Mail applications	
CallPilot Desktop Messaging for Internet Mail applications.....	24
Using the CallPilot Player.....	24
Playing a message.....	25
Recording and sending a message.....	25
Deleting a message.....	25

Logging on

Use your CallPilot password to log on to Desktop Messaging.

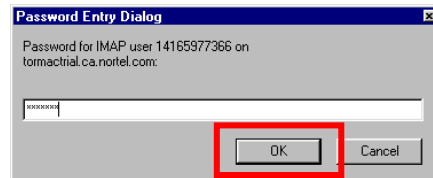
To log on from Microsoft Outlook, Lotus Notes, or Novell GroupWise

- 1 Open Microsoft Outlook, Lotus Notes, or Novell GroupWise.
- 2 Type your CallPilot password in the **Password** box.
- 3 Click the **OK** button.



To log on from an Internet mail application

- 1 Open your Internet mail application. The Password window is similar to the one shown.
- 2 In the **Password** box, type your CallPilot password.
- 3 Click the **OK** button.



Remote logon

You can log on to your CallPilot mailbox from any computer that has Desktop Messaging installed and configured in the same way as your office computer. For example, you can use a computer that is set up for guest access, or your home computer with a dial-up connection to the server.

Changing your CallPilot password

You can change your CallPilot password from Desktop Messaging or from your telephone.

To access CallPilot Password Change from Microsoft Outlook

- 1 In your Inbox, on the **Tools** menu, click **Services**.
The Services dialog box appears with the Services tab open.
- 2 Select **CallPilot Desktop Messaging**, and click the **Properties** button.
- 3 On the **General** tab click the **Change Password** button.

To access CallPilot Password Change from Lotus Notes

- 1 In your Inbox, on the **Actions** menu, click **CallPilot Configuration**, and then click the **General** tab.
- 2 Click the **Change Password** button.

To access CallPilot Password Change from Novell GroupWise

- 1 In your inbox, on the **Tools** menu, click **CallPilot Desktop Messaging**, select **CallPilot Desktop Messaging Options**, and then click the **General** tab.
- 2 Click the **Change Password** button.

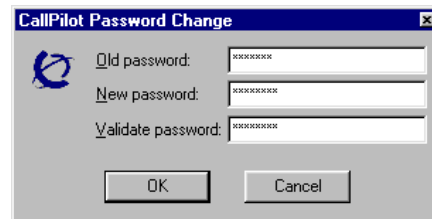
To access CallPilot Password Change from Internet mail applications

You must have the CallPilot Player installed on your computer.

- 1 Click the Windows **Start** button, select **Programs**, select **Nortel Networks CallPilot Desktop Messaging**, and then click **CallPilot Player**.
- 2 On the **Tools** menu, click **Options**, and then select the **IMAP Server Configuration** tab.
- 3 Click the **Change Password** button.

To change your password

- 1 In the **Old password** box, type your current password.
- 2 In the **New password** box, type your new password.
- 3 In the **Validate password** box, type your new password again.
- 4 Click the **OK** button.



Sending a message to an external recipient

CallPilot supports two types of voice files: wav and vbk.

If you want to send messages to external recipients who are not on your CallPilot system, you can configure CallPilot to use the format that is appropriate for the recipient.

To configure CallPilot to automatically use the format that is appropriate for your recipients

- 1 On the **Tools** menu click **Services**.
The services dialog box opens.
- 2 In the list select **CallPilot Desktop Messaging**.
- 3 Click the **Properties** button.
The **CallPilot** dialog box opens with the General tab open.
- 4 Select the **Use CallPilot form** check box.
- 5 Click the **OK** button.

Now when you send messages to CallPilot and non-CallPilot recipients, CallPilot automatically sends the message in the format that is appropriate for the recipient.

CallPilot Desktop Messaging for Microsoft Outlook

You can use CallPilot Desktop Messaging with Outlook 98, Outlook 2000 and Outlook XP. When you open Microsoft Outlook, your CallPilot messages appear in the Inbox under the CallPilot Message Store. From the Inbox, you can open, move, copy, delete, forward, and reply to messages, and compose new messages.

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

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

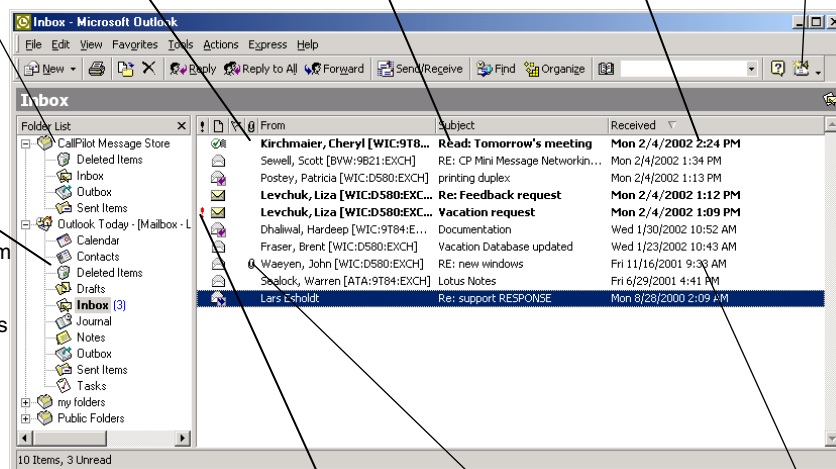
To open a message, double-click the message line

Read receipt shows that your message was opened by the recipient

New messages appear in **bold**

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

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



Exclamation mark shows that this message is urgent

Paperclip icon shows that this message has an attached file

Date and time received

To work offline

To work offline, you need a computer that has Desktop Messaging installed and configured in the same way as your office computer.

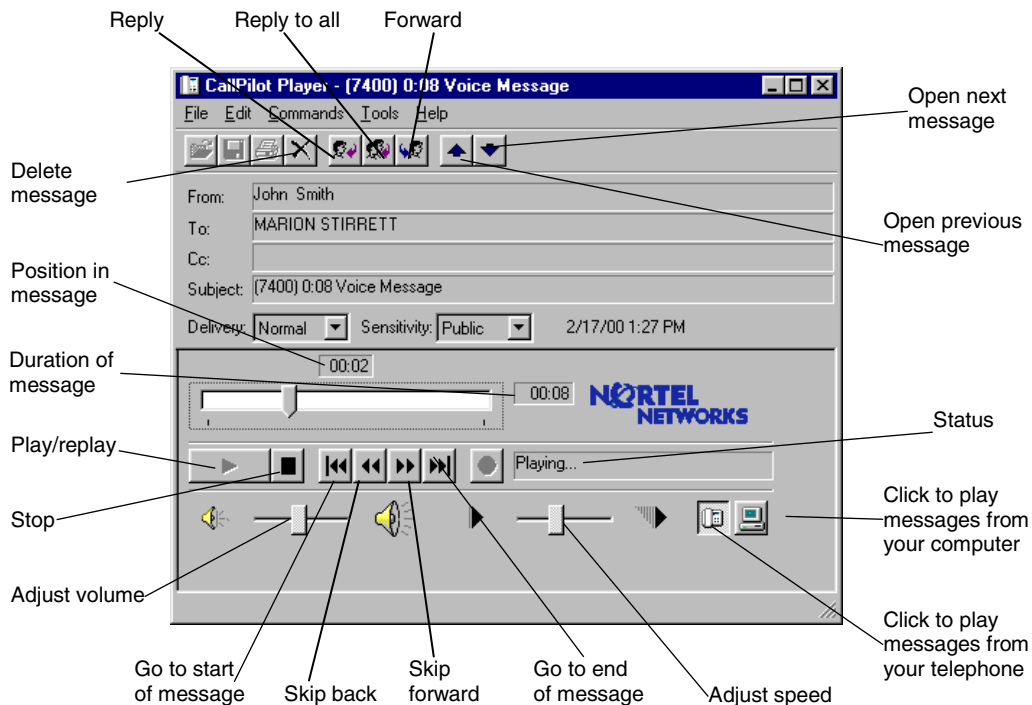
- 1 Log on to Microsoft Outlook.
- 2 On the **Tools** menu, click **CallPilot Desktop Messaging**, then click **Download all CallPilot Messages**.
- 3 After the messages download, log off.
- 4 When you log on again, you can choose to work offline. While you work offline, you can review your messages and record new messages from your computer. CallPilot stores your new messages in your Outbox and sends them the next time you log on to the CallPilot server.

Playing a message

To play a voice message

To open a voice message, double-click the message line. The CallPilot Player appears.

You can choose to play your voice messages from your telephone or your computer by clicking the Telephone or Computer icon on the CallPilot Player. You can change this selection at any time. If you select Telephone, the phone rings when you open a message, and the message plays when you answer. If you select Computer, your messages play through your computer's speakers or your headphones.



To change your audio device

- 1 On the CallPilot Player by click the **Telephone** or **Computer** icon.
Or
- 1 In your Inbox, on the **Tools** menu, click **Services**.
- 2 In the list, select CallPilot Desktop Messaging and click the **Properties** button.
- 3 Click the **Audio** tab, and from the **Audio device** option select **Telephone** or **Computer** and click the **OK** button.

To change the telephone number that CallPilot dials to play your voice messages

- 1 On the **Audio** tab select **Telephone** as your audio device, and then change the telephone number.

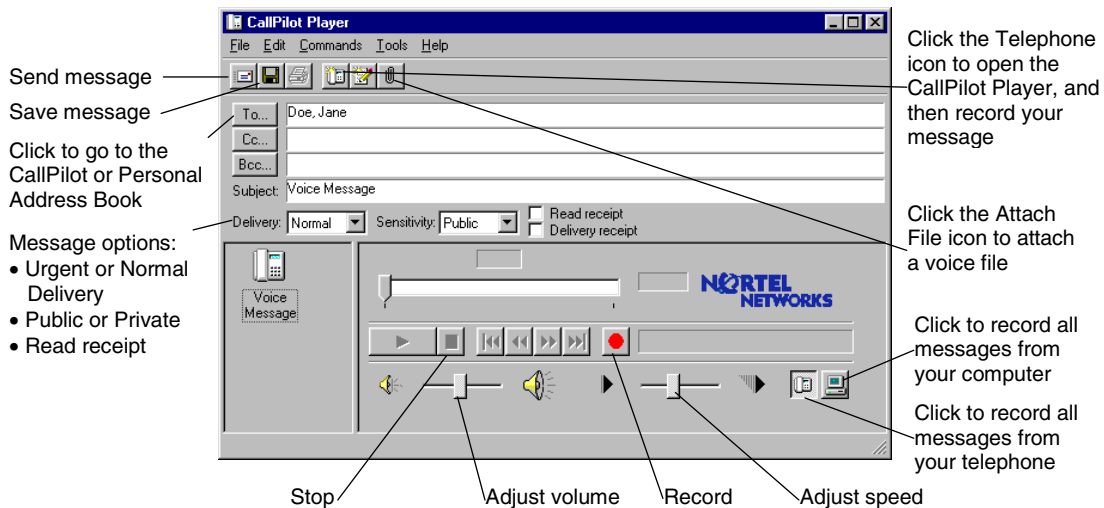
Recording a message

You can record a voice message from the CallPilot player. The message you record can be a new message, a reply to a received message, or an introduction to a forwarded message. Before you send the message, you can add voice message attachments and options.

To record and send a voice message

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

- 1 On the Microsoft Outlook toolbar, click the **New CallPilot Message** icon.
- 2 On the CallPilot Player, click the **Record** button to start recording.
- 3 If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. The message can be a maximum of 10 minutes.
If you are recording from the telephone, answer when it rings. At the tone, record your message. Click **Stop** to end the recording, and then hang up. The message can be a maximum of 10 minutes.
- 4 Click **To** to open the CallPilot or Personal Address Book, or type the formatted address in the **To** field. For addressing information, see “Addressing a message” on page 10.
- 5 Add attachments and options if required. See [Adding attachments](#) on page 9 and [Setting Message options](#) on page 11.
- 6 On the toolbar, click the **Send Message** icon.



To save a newly created voice message as a file

You can record a voice message and save it to use later.

- 1 In a new CallPilot message, record a message, and on the **File** menu, click **Save as**.
- 2 In the **File name** box, type a name for the file, select a folder to keep the file in, and then click the **Save** button. Save a voice file as a vbk file if all your recipients are CallPilot users. If some recipients are not CallPilot users, save a voice file as a wav file.

Forwarding and replying to a message

You can forward a voice message and record an introduction to send with it. You can also record a reply to the sender of a message, or to the sender and all the recipients of a message. The message can be a maximum of 10 minutes.

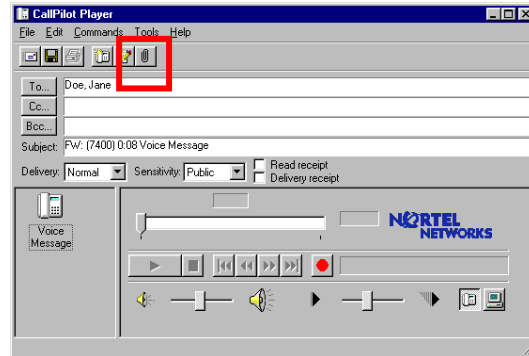
To forward or reply to a message

- 3 In an open message, click the **Forward**, **Reply**, or **Reply to all** icon.
- 4 Follow the steps for recording a message in “Recording a message” on page 8.
- 5 Address the message the same way that you address a new message. See [Addressing a message](#) on page 10. If you are replying to a message, your reply is addressed automatically.

You can change the subject line before you send the message. The subject can be a maximum of 80 characters.

Note: Do not use the right-click menu to forward a Desktop Messaging message. To forward a message, either:

- open the message and forward it from the CallPilot window or
- select the message in the Outlook Inbox and forward it from the Outlook toolbar.

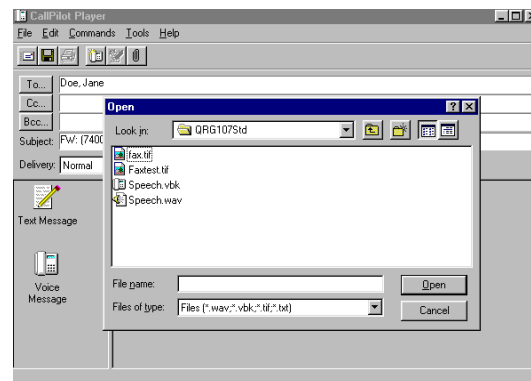


Adding attachments

Before you send a message, you can attach a voice file to it. The message can be a maximum of 10 minutes. You can send either vbk or wav files to CallPilot recipients. Voice files that you send to recipients who do not use CallPilot must be wav files. For more information see [Sending a message to an external recipient](#) on page 5.

To attach a file to a message

- 1 In a new CallPilot message, click the **Attach File** icon.
- 2 Browse for the name of the voice file that you want to attach, or type the name of the file in the **File name** box. The files you attach must be in wav or vbk format.
- 3 Click the **Open** button to attach the file and return to the new CallPilot message.



Addressing a message

The CallPilot Address Book contains the names and addresses of everyone on your local CallPilot server. You cannot edit this list. To use the CallPilot Address Book, download it to your computer.

To download the CallPilot Address Book

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

To add CallPilot addresses to your Personal Address Book

You can add CallPilot addresses to the list of e-mail addresses in your Personal Address Book. You can distinguish between CallPilot and e-mail addresses by adding "CallPilot" after the recipient's name.

To add an address to your Personal Address Book

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

To create an address and add it to your Personal Address Book

- 1 On the **Tools** menu, select **Address Book**.
- 2 On the **File** menu, click **New Entry**. Select CallPilot Address, select **Put this entry in the Personal Address Book**, and then click **OK**.
- 3 Click the **CallPilot - General** tab and select the appropriate address type from the **CallPilot address type** list box. Enter the required address details. Refer to the online Help for the correct addressing formats.
- 4 Click the **OK** button.

The screenshot shows the 'New CallPilot Address Properties' dialog box with the following details:

- Tab: CALLPILOT - General
- Display name: John Smith
- Local CallPilot server: tormactrial.ca.nortel.com
- CallPilot address type: Network mailbox
- Network mailbox: (empty field)
- Buttons: Send Options..., OK, Cancel, Apply, Help

To address a message from your CallPilot or Personal Address Book

- 1 In a new CallPilot message, click the **To** button.
- 2 From the **Show names list** select **CallPilot Address Book** or **Personal Address Book**.
- 3 Select the name of the recipient.
- 4 Click **To ->**. You can select one or more addresses and click **To ->** after each one.
- 5 Click the **OK** button to return to the new CallPilot message.

To address a message manually

You can type an address directly into the **To** field of a new message. Enclose the address in square brackets. Refer to the online Help for the correct addressing formats.

Setting message options

In a new CallPilot message, you can set priority, sensitivity, and acknowledgment options.

To set Delivery priority for a message

Select Urgent, or leave the setting as Normal. The Economy option is the same as the Normal setting.

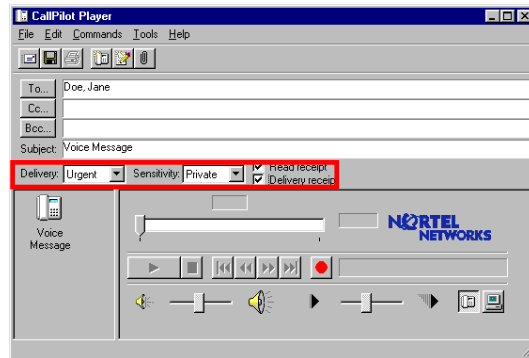
To set Sensitivity for a message

Select Private, or leave the setting as Public.

The recipient can forward messages that you send as Private. Also, recipients in non-CallPilot systems may not be informed of Private settings. In your message, tell the recipient that the message is Private.

To request a Read receipt

Select Read receipt to request acknowledgment that the recipient opened the message. Delivery receipt is not supported.



Deleting a message

When you delete a message in Microsoft Outlook, the message moves to the Deleted Items folder.

Outlook permanently deletes these messages from your CallPilot mailbox when you exit Outlook. The messages are deleted immediately when you exit.

CallPilot Desktop Messaging for Lotus Notes

When you open Lotus Notes and log on to CallPilot Desktop Messaging, you are in the Workspace at Office window.

To open your CallPilot Inbox, click the Mail icon, click Folders and Views, and then click CallPilot Desktop Messaging. Your Inbox contains your received, sent, draft, and deleted CallPilot messages. From the Inbox, you can open, move, copy, delete, forward, and reply to messages, and compose new messages.

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

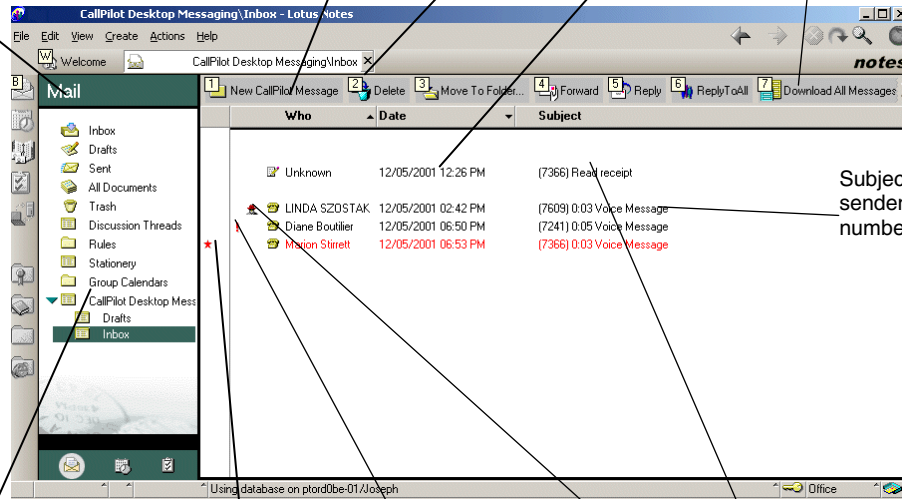
To open Desktop Messaging, double-click the Mail icon in the Workspace at Office window

To create a new message click New CallPilot Message

Moves a message to the Trash

To open a message, double-click the message line

Downloads all CallPilot messages



Subject shows sender's phone number

To open your Inbox, click Folders and Views, then CallPilot Desktop Messaging

Star icon indicates a new message

Exclamation mark shows that this message is Urgent

Sleuth icon shows that this message is Private

Read receipt shows that your message was opened by the recipient

To work offline

See the instructions in the online Help for configuring Desktop Messaging so that you can work offline.

To retrieve your messages before you work offline

1 Log on to Lotus Notes, open your Inbox, and on the **Actions** menu, click **Download All Messages**.

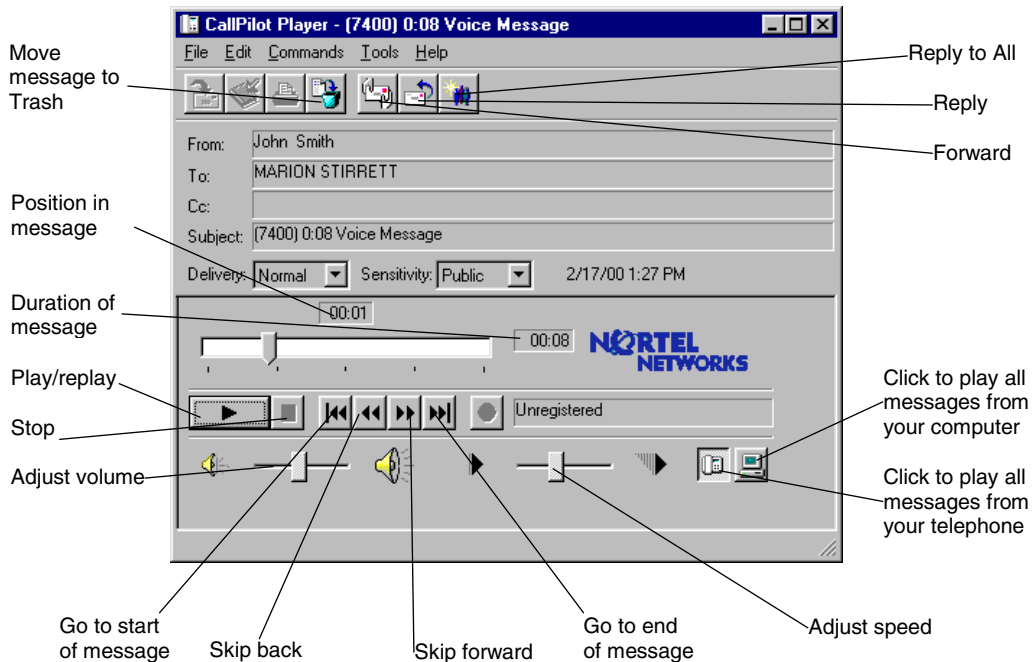
When you want to work offline, log off and restart Lotus Notes in Island mode. You can then review your messages and record new messages from your computer. Lotus Notes stores the messages you send in Island mode and sends them the next time you connect to the CallPilot server. You can log on to CallPilot from Island mode.

Playing a message

To play a voice message

To open a voice message, double-click the message line. The CallPilot Player appears.

You can choose to play your voice messages from your computer or your telephone by clicking the Telephone or Computer icon in the CallPilot Player. You can change this selection at any time. If you select Telephone, the phone rings when you open a message, and the message plays when you answer. If you select Computer, your messages play through your computer's speakers or your headphones.



To change your audio device

- 1 On the CallPilot Player by click the **Telephone** or **Computer** icon.
Or
- 1 In Lotus Notes, on the **Actions** menu, click **CallPilot Configuration**.
- 2 Click the **Audio** tab, and select **Telephone** or **Computer**.

To change the telephone number that CallPilot dials to play your voice messages

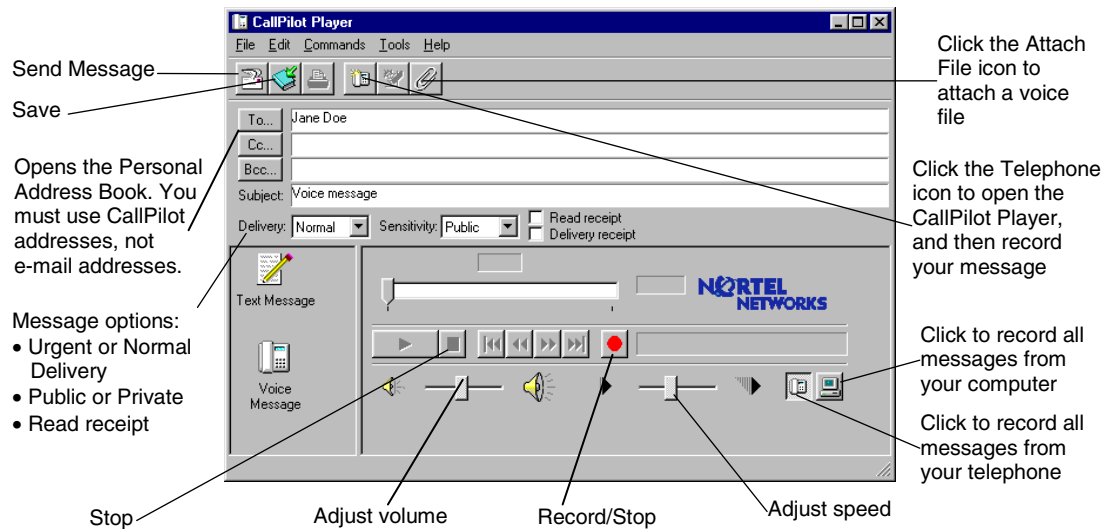
- 1 On the **Audio** tab make sure that **Telephone** is selected as your audio device, then change the telephone number.

Recording a message

To record and send a voice message

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

- 1 In the CallPilot Desktop Messaging Inbox, click the **New CallPilot Message** icon.
- 2 On the CallPilot Player, click the **Record** button to start recording.
- 3 If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. The message can be a maximum of 10 minutes.
If you are recording from the telephone, answer it when it rings. At the tone, record your message. Click **Stop** to end the recording, and then hang up. The message can be a maximum of 10 minutes.
- 4 Click **To** to open your personal Address Book, or type the formatted address in the To field. For addressing information, see [Addressing messages](#) on page 16.
- 5 Add attachments and options if required. See [Adding attachments](#) on page 15 and [Setting message options](#) on page 17.
- 6 On the toolbar, click the **Send Message** icon.



To save a newly created voice message as a file

You can record a voice message and save it as a file to use later.

- 1 In a new CallPilot message, record a message.
- 2 On the **File** menu, click **Save as**.
- 3 In the **File name** box, type a name for the file, select a folder to keep the file in, then click **Save**. Save a voice file as a vbk file if your recipients are CallPilot users. Save the file as a wav file if some of your recipients do not use CallPilot.

Forwarding and replying to a message

You can forward a voice message and record an introduction to send with it. You can also record a reply to the sender of a message, or to the sender and all the recipients of a message. The message can be a maximum of 10 minutes.

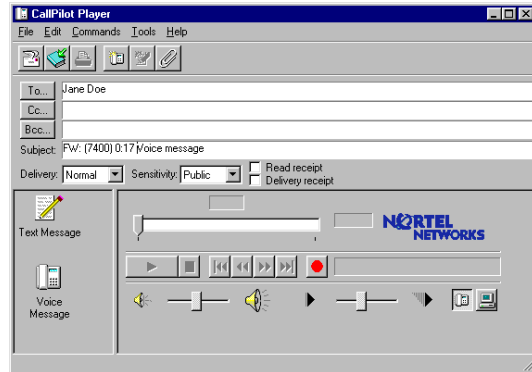
To forward or reply to a message

- 1 In an open message, click the **Forward**, **Reply**, or **Reply to all** icon.
- 2 Follow the steps for recording a message on page 14.
- 3 Address the message the same way that you address a new message. Refer to “Addressing a message” on page 16. If you are replying to a message, your reply is addressed automatically.

You can change the subject line before you send the message. The subject can be a maximum of 80 characters.

Note: Do not use the right-click menu to forward a Desktop Messaging message. To forward a message, either:

- open the message and forward it from the CallPilot window or
- select the message in the Inbox and forward it from the toolbar.

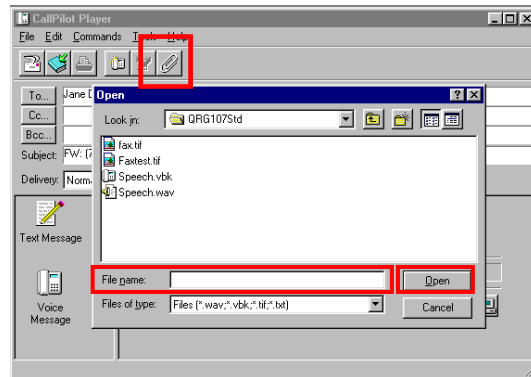


Adding attachments

Before you send a message, you can attach a voice file to it. You can send either vbk or wav files to CallPilot recipients. Voice files that you send to recipients who do not use CallPilot must be wav files. For more information see [Sending a message to an external recipient](#) on page 5.

To attach a file to a message

- 1 In a new CallPilot message, click the **Attach File** icon.
- 2 Browse for the file you want to attach or type the name of the voice file in the File name box. The files you attach must be in wav or vbk format.
- 3 Click the **Open** button to attach the file and return to the new CallPilot message.



Addressing a message

To address a message manually

You can type an address directly into the To box of a new message. Enclose the address in quotation marks. Refer to the online Help for the correct addressing formats.

You can download the names and addresses of any CallPilot users on your Lotus Notes server to your personal Address Book. After you download this list, you can add to it or edit it.

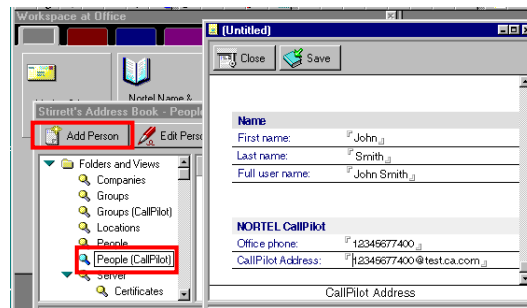
To download CallPilot addresses to your personal Address Book

- 1 For automatic download, in your Inbox, on the **Actions** menu, click **CallPilot Configuration**, and then click the **Address Book** tab.
- 2 Select **Download address book at logon**, then click the **OK** button.
Or
- 1 For manual download, in your Inbox, on the **Actions** menu, click **CallPilot Configuration**, then click the **Address Book** tab. Make sure the Download Address Book at logon box is not checked.
- 2 In the **Workspace at Office** window, double-click the **Address Book** icon.
- 3 In your personal Address Book, in the left pane, click **People (CallPilot)**.
- 4 On the **Actions** menu, click **Download CallPilot Address Book**.

To add names to your personal Address Book

You can create a CallPilot address manually and add it to your personal Address Book.

- 1 Double-click the **Address Book** icon in the Workspace at Office window.
- 2 Select **People (CallPilot)**, and then click the **Add Person** button.
- 3 Enter at least a Last Name and First Name.
- 4 Click the arrow beside **CallPilot Address** to open the CallPilot Address Assistant. Select the appropriate address type.
- 5 In the **Address** dialog box, enter the required details. Refer to the online Help for the correct addressing formats.
- 6 Click **Add Address to Personal Address Book**, and then click the **OK** button.
- 7 In **Person (CallPilot)**, click the **Save** button, then click the **Close** button.



To address a message from the address book

- 1 In a new CallPilot message, click **To** and select either the CallPilot address list on your Lotus Notes server, or, in your personal Address Book, select **People or Groups (CallPilot)**.
- 2 From the **Name** list, select the name of the recipient.
Click **To ->**. To select one or more addresses, click **To ->** after each one.
- 3 Click the **OK** button to return to the new CallPilot message.

Setting message options

In a new CallPilot message, you can set priority, sensitivity, and acknowledgment options.

To set Delivery priority for a message

Select Urgent, or leave the setting as Normal. The Economy option is the same as the Normal setting.

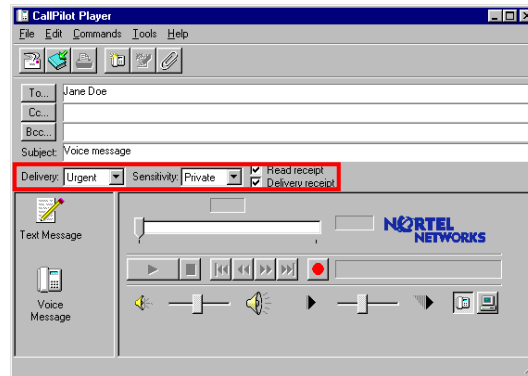
To set Sensitivity for a message

Select Private, or leave the setting as Public.

Be aware that messages you send marked Private can be forwarded by the recipient. Also, recipients in non-CallPilot systems may not be informed of Private settings. In your message, tell the recipient that the message is Private.

To request a Read receipt

Select Read receipt to request acknowledgment that the recipient received the message. Delivery receipt is not supported.



Configuring Lotus Notes to automatically check for messages

To make sure that your Lotus Notes messages are current, you can configure Lotus Notes to automatically check for messages.

To configure Lotus Notes to automatically check for messages

- 1 On the **File** menu click **Preferences** and then click **User Preferences**.
- 2 Click **Mail and News Settings**.
- 3 At the Receiving option select **Check for new mail every ___ minutes**, and enter a number for how often you want Lotus Notes to check for new messages.

For more information about configuring Lotus Notes, refer to your Lotus Notes documentation.

Deleting a message

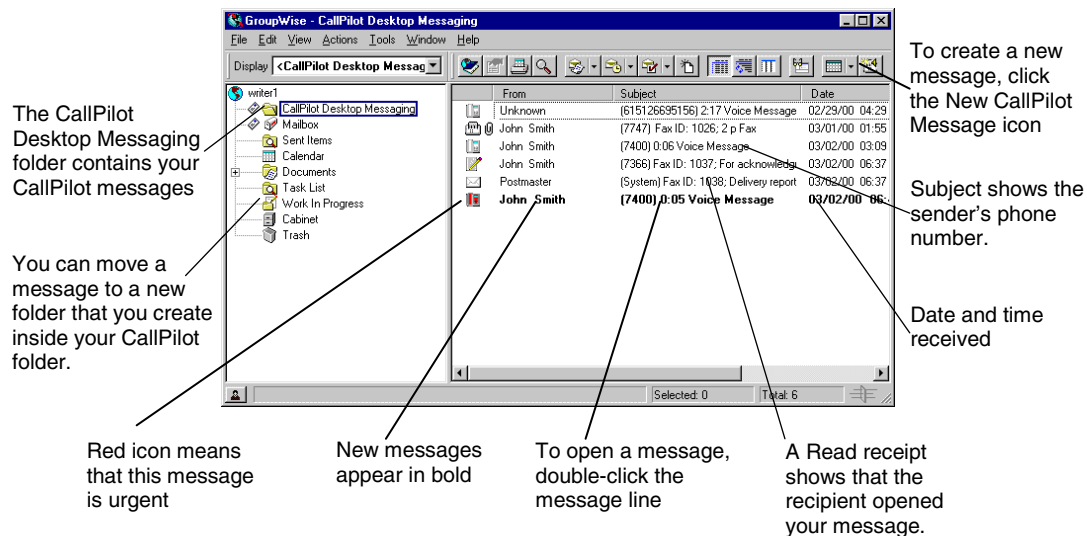
When you delete a message in Lotus Notes, the message moves to the Trash folder. To permanently delete these messages, select **Actions** and click **Empty Trash**.

To delete a message while it is open, click the **Empty Trash** icon on the toolbar of the open message to delete the message. The message is permanently deleted, and does not move to the Trash folder.

CallPilot Desktop Messaging for Novell GroupWise

When you open Novell GroupWise, your CallPilot messages appear in the CallPilot Desktop Messaging folder. You can open, move, copy, delete, forward, and reply to messages, and compose new messages.

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



To work offline

To work offline, you need a computer that has Desktop Messaging installed and configured in the same way as your office computer.

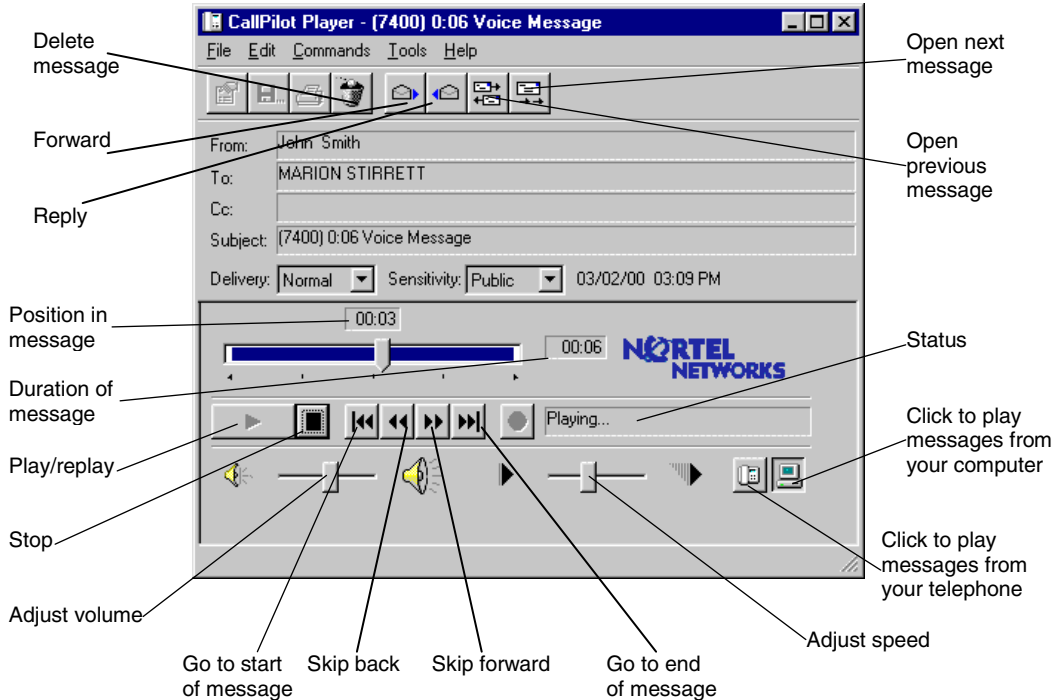
- 1 Log on to Novell GroupWise.
- 2 On the **Tools** menu click **CallPilot Desktop Messaging**.
- 3 Click **Download all CallPilot Messages**. You can now work offline, review your messages and record new messages from your computer. CallPilot stores your new messages and sends them the next time you log on to the CallPilot server.

Playing a message

To play a voice message

To open a voice message, double-click the message line. The CallPilot Player appears.

You can choose to play your voice messages from your telephone or your computer by clicking the Telephone or Computer icon in the CallPilot Player. You can change this selection at any time. If you select Telephone, the phone rings when you open a message, and the message plays when you answer. If you select Computer, your messages play through your computer's speakers or your headphones.



To change your audio device

- 1 On the CallPilot Player, click the **Telephone** or **Computer** icon.
Or
- 1 In your Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging**.
- 2 Click **CallPilot Desktop Messaging Options**.
- 3 Click the **Audio** tab, and select **Telephone** or **Computer**.

To change the telephone number that CallPilot dials to play your voice messages

- 1 On the **Audio** tab make sure that **Telephone** is selected as your audio, and then change the telephone number.

Recording a message

You can compose a voice message in the CallPilot Player. Your message can be a new message, a reply to a received message, or an introduction to a forwarded message. Before you send a message, you can add voice attachments and options.

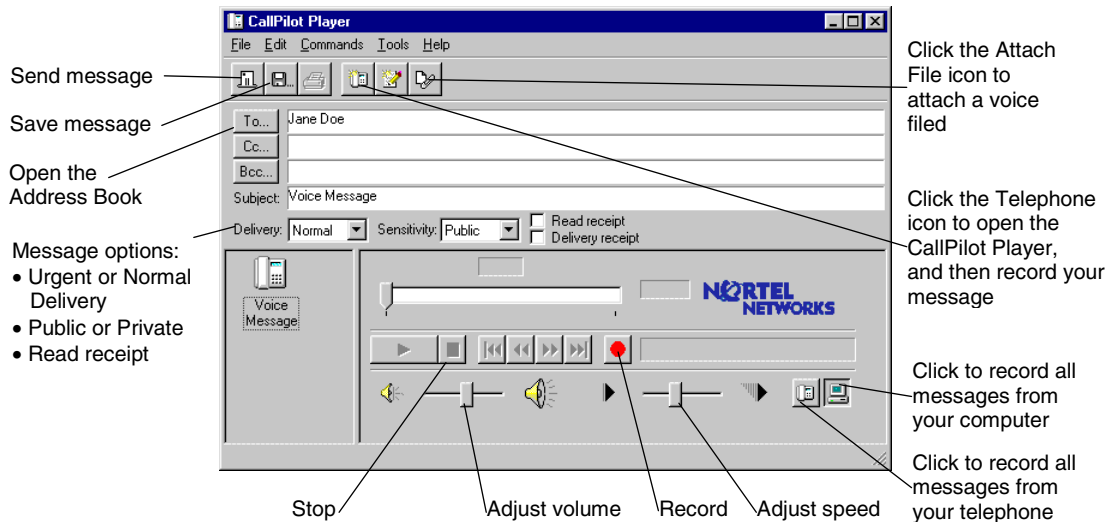
To record and send a voice message

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

- 1 On the Novell GroupWise toolbar, click the **New CallPilot Message** icon.
- 2 On the CallPilot Player, click the **Record** button to start recording.
- 3 If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. The message can be a maximum of 10 minutes.

If you are recording from the telephone, answer when it rings. At the tone, record your message. Click **Stop** to end the recording, and then hang up. The message can be a maximum of 10 minutes.

- 4 Click **To** to open the Address Book, or type the formatted address in the To box. For how to [address a message](#), see page 22. To add attachments and options see pages 21 and 23.
- 5 On the toolbar, click the **Send Message** icon.



To save a newly created voice message as a file

You can record a voice message and save it as a file to use later.

- 1 In a new CallPilot message, record a message, and on the **File** menu, click **Save as**.
- 2 In the **File name** box, type a name for the file, select a folder to keep the file in, then click **Save**. Save a voice file as a vbk files if your recipients are CallPilot users. Save a voice file as a wav file for non-CallPilot users.

Forwarding and replying to a message

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

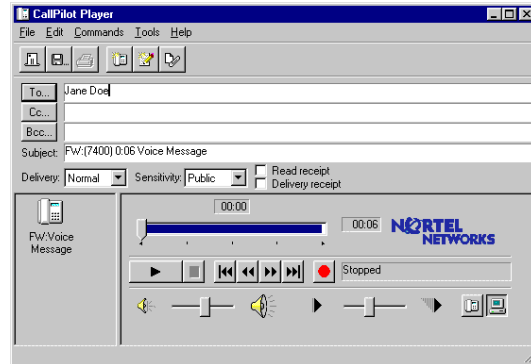
To forward or reply to a message

- 3 In an open message, click the **Forward**, **Reply**, or **Reply to all** icon.
- 4 Follow the steps for recording a message on page 20.
- 5 Address a forwarded message the same way as a new message. For information on [addressing a message](#) see page 22. If you are replying to a message, your reply is addressed automatically.

You can change the subject line before you send the message. The subject can be a maximum of 80 characters.

Note: Do not use the right-click menu to forward a Desktop Messaging message. To forward a message, either:

- open the message and forward it from the CallPilot window or
- select the message in the Inbox and forward it from the toolbar.

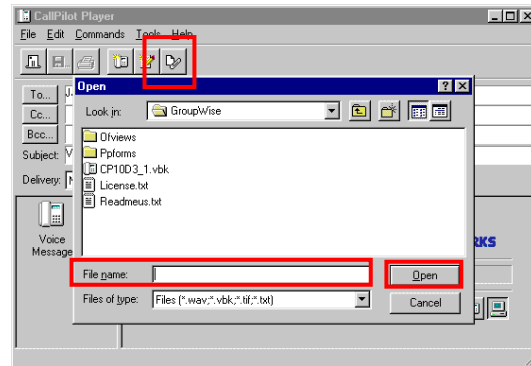


Adding attachments

Before you send a message, you can attach a voice file to it. You can send either vbk or wav files to CallPilot recipients. Voice files that you send to recipients who do not use CallPilot must be wav files. For more information see [Sending a message to an external recipient](#) on page 5.

To attach a file to a message

- 1 In a new CallPilot message, click the **Attach File** icon.
- 2 Browse for the voice file you want to attach, or type the name of the file in the **File name** box. The files you attach must be in wav or vbk format.
- 3 Click the **Open** button to attach the file and return to the new CallPilot message.



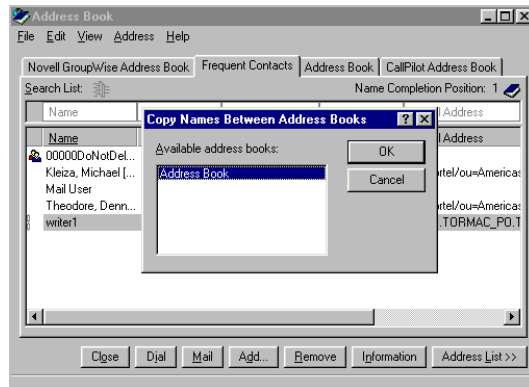
Addressing a message

To add CallPilot addresses to your personal Address Book

You can add CallPilot addresses to the list of e-mail addresses in your personal Address Book. You may want to distinguish between CallPilot and e-mail addresses by adding CallPilot after the recipient's name. You can also add distribution list names to your personal Address Book.

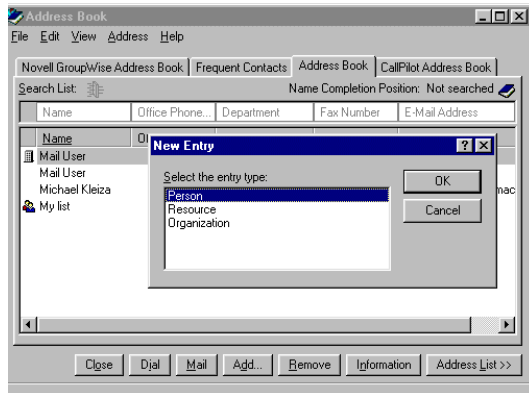
You can add a CallPilot address to your personal Address Book by copying it.

- 1 In the CallPilot Address Book, right-click the name you want to add.
- 2 Click **Copy**.
- 3 In **Copy Names Between Address Books**, select the name of your personal Address Book, and then click the **OK** button.



To create an address manually and add it to your personal Address Book

- 1 On the **Tools** menu, select **Address Book**.
- 2 Select your personal Address Book, and then click the **Add** button.
- 3 From the **New Entry** list, select **Person** and click the **OK** button.
- 4 Click the **CallPilot – General** tab. Select the appropriate address type. Enter the required address details. Refer to the online Help for the correct addressing formats.
- 5 Click the **OK** button.



To address a message from your address book

- 1 In a new CallPilot message, click **To**.
- 2 Select CallPilot Address Book or your personal Address Book.
- 3 Select the name of the recipient.
- 4 Click **Add ->**. To select one or more addresses, click **Add ->** after each one.
- 5 Click the **OK** button to return to the new CallPilot message.

To address a message manually

You can type an address directly into the To field of a new message. Refer to the online Help for the correct addressing formats.

Setting message options

In a new CallPilot message, you can set priority, sensitivity, and acknowledgment options.

To set Delivery priority for a message

Select Urgent, or leave the setting as Normal. The Economy option is the same as the Normal setting.

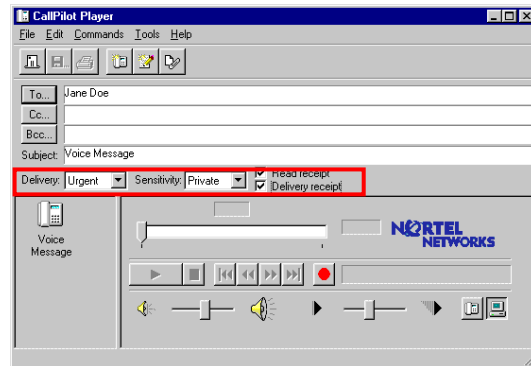
To set Sensitivity for a message

Select Private, or leave the setting as Public.

Be aware that messages you send marked Private can be forwarded by the recipient. Also, recipients in non-CallPilot systems may not be informed of Private settings. In your message, tell the recipient that the message is Private.

To request a Read receipt

Select Read receipt to request acknowledgment that the recipient received the message. Delivery receipt is not supported.



Deleting a message

If you use Novell GroupWise and you delete a CallPilot message, the message is deleted immediately. It is not moved to a deleted items folder.

CallPilot Desktop Messaging for Internet mail applications

You can use these Internet mail applications with CallPilot Desktop Messaging:

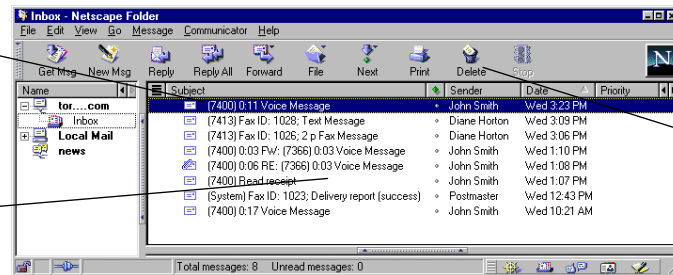
- Netscape Messenger
- Microsoft Outlook Express
- Microsoft Outlook 98
- Eudora Pro

Ask your administrator whether the version of the application you use is supported.

When you open your Internet mail application, you see your CallPilot messages and your e-mail messages. You can open, move, copy, delete, forward, reply to and compose CallPilot messages.

To open a message, double-click the message line

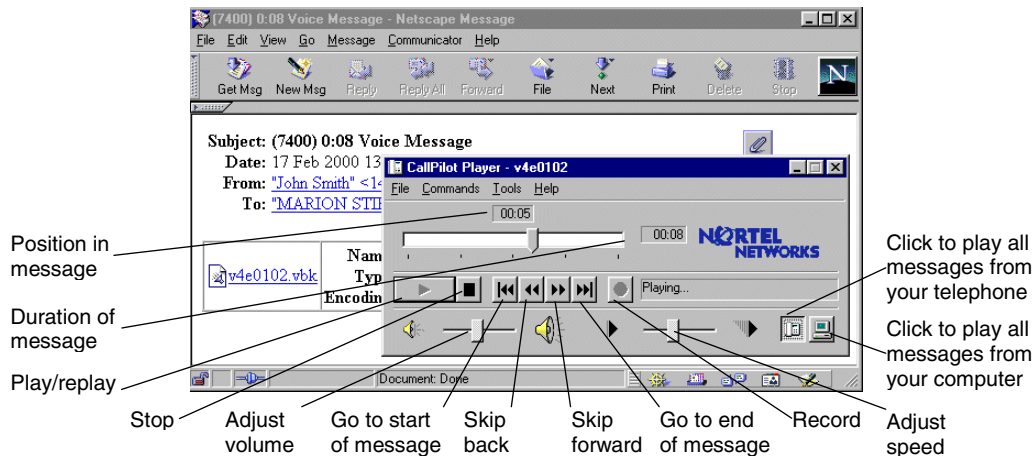
Subject shows sender and message details.



Deleted messages are deleted immediately or later, depending on your configuration

Using the CallPilot Player

Use the CallPilot Player to play and record voice messages. To open the CallPilot Player, click the Start button, click Programs, click Nortel Networks CallPilot Desktop Messaging, then click CallPilot Player. Refer to the online Help for the CallPilot Player for configuration information.



Playing a message

To play a voice message

- 1 Double-click the message to open it.
- 2 Click the **Voice** icon to open the CallPilot Player.
- 3 On the CallPilot Player, click the **Telephone** or **Computer** icon to select the audio device for playing voice messages. You can change this selection at any time.

If you select Telephone, the phone rings when you open a message, and the message plays when you answer.

If you select Computer, your message plays through your computer speakers or your headphones.

Recording and sending a message

When you address a message, use only CallPilot addresses. Depending on the Internet Mail client you use, you may be able to set options such as urgent or private. The message can be a maximum of 10 minutes.

To compose and send a message

- 1 In a new CallPilot message, record your message.
- 2 Click the **To** button. Select a CallPilot address from your address book, or type a CallPilot address in the **To** box.
- 3 Click the **Send** button.

To forward or reply to a message

- 1 Click the **Forward**, **Reply**, or **Reply All** icons to open a new message window. Do not right-click to forward a message.
- 2 Record your message.
- 3 Click the **To** button. Select a CallPilot address from your address book, or type a CallPilot address in the **To** box. If you are replying to a message, your reply is addressed automatically.
- 4 Click the **Send** button.

To attach a file to a message

- 1 Click the **Attach** or **Insert File** icon in the new message window.
- 2 Navigate to the file that you want to attach, select it, then click **Open** or **Attach**.

Deleting a message

By default, Internet Mail clients (Netscape Messenger, Microsoft Outlook Express and Outlook 98, and Eudora Pro) move deleted CallPilot messages to a Deleted Items or Trash folder where you can recover the messages or permanently delete them.

Messages stored in this folder remain in your CallPilot mailbox on the CallPilot server until they are permanently deleted. To permanently delete the messages, empty this folder. For more information, refer your email client's online Help.

CallPilot 100/150 Desktop Messaging Quick Reference Guide

Nortel Networks

Copyright © 11 June, 2004 Nortel Networks, All Rights Reserved.

Information is subject to change without notice. Nortel Networks reserves the right to make changes in design or components as progress in engineering and manufacturing may warrant.

P0607188 02



How the world shares ideas.