

InterCall Online User Guide

Administrator Account Management



For more information:

United States:
800.374.2441
www.intercall.com
info@intercall.com

Canada:
877.333.2666
www.intercall.ca

As an administrator, and depending on your level of access, you have the ability to manage and start meetings on behalf of your users, access their recordings, add, change and delete owner profiles, set up various billing groups or invoice accounts, view and edit your company profile and approve new owner profile requests. You can also submit and track trouble tickets for conferencing problems that may occur.

Manage Meetings

As an administrator, you can schedule, edit, delete and start meetings on behalf of other users. Go to My Meetings. At the top of the screen, select **Act as delegate for another user** and search for the user whose meetings you wish to access.

> My Meetings

i You are currently logged in as: **alisonUSA** [Act as delegate for another user](#)
i Use the search boxes below to filter the list of scheduled meetings.

Search

Search: From To

Meetings For Alison 1 Templeton

Date	Topic	Leader Name	Owner	Conf ID	Meeting Number	Duration
<input type="checkbox"/> Sun Oct 31, 2010 / 9:45am ET	Recurring test	Alison Templeton	Alison 1 Templeton	78155918		15

The screen will refresh to show calls booked for that user. You can edit any of the calls that appear on the screen by highlighting them and clicking **Edit**. To start Reservationless-Plus Call Manager on behalf of the user, select the option in the **Start Instant Meeting** drop-down. Click **Schedule a Meeting** to book a call on behalf of the owner.

When you have completed the actions for that user, click **Act as delegate for another user** button to switch to another user within your organization.

Manage Recordings

As an administrator, you can manage the Reservationless-Plus recordings of your users. On the My Library page, click **Act as delegate for another user** and search for the user whose recordings you wish to access.

i You are currently logged in as: **alisonUSA** [Act as delegate for another user](#)

My Library For Alison 1 Templeton

[My Archives](#)

[My Address Book](#)

[My Templates](#)



AAP/EOE

The screen will refresh to show the My Library page for that user. Click **My Archives** to access that user's recordings. From here, you can download a copy of the recording, extend the archive and request a copy on CD.

Manage Users, Accounts and Company Information

To access your account management tool visit the **Manage Your Account** section.

Manage My Account
SECURITY & PASSWORDS Change Your Password & Security Settings
OWNER Set Up New Owner View/Edit Owner Information Manage Delegates
ACCOUNT Set Up a New Billing Account Profile View/Edit Account Information
COMPANY View/Edit Company Information
USER ROLE Administer Roles
OWNER REQUESTS Approve New Owner Requests

Change Your Password and Security Settings

To select a new password for InterCall Online or to change your secret question and answer, click **Change Your Password & Security Settings** within the Manage MY Account page.

CHANGING YOUR PASSWORD

- 1 Enter your current password.
- 2 Enter your new password.
- 3 Confirm your new password.
- 4 Click **Save Changes**.

› [Manage Your Account](#) › [Change Password and Secret Question](#)

Change Password and Security Options

*-Required Fields

* Current Password

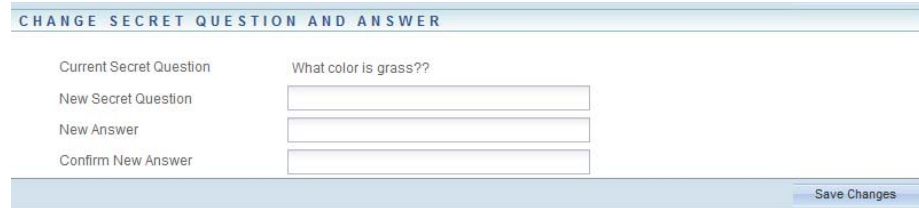
CHANGE PASSWORD

New Password

Confirm Password

CHANGING YOUR SECRET QUESTION AND ANSWER

- 1 Enter your new secret question.
- 2 Enter your new answer.
- 3 Confirm your new answer.
- 4 Click **Save Changes**.

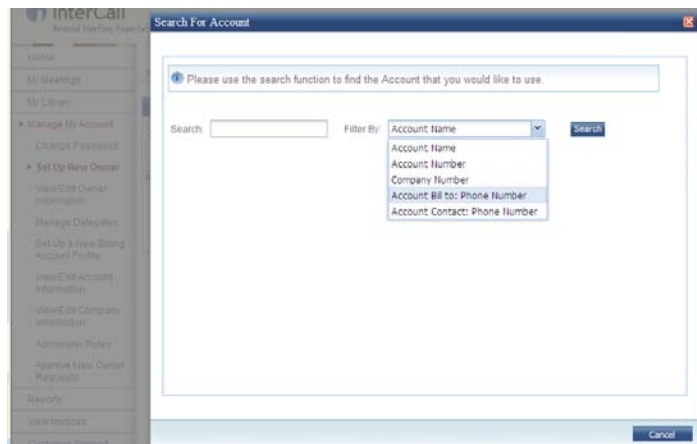


The screenshot shows a web form titled "CHANGE SECRET QUESTION AND ANSWER". It contains four input fields: "Current Secret Question" (pre-filled with "What color is grass??"), "New Secret Question", "New Answer", and "Confirm New Answer". A "Save Changes" button is located at the bottom right of the form.

Set Up a New Owner

When logged into InterCall Online as an administrator, selecting **Set Up New Owner** allows you to create a new owner profile for a user who is under the hierarchy of your responsibility.

- 1 Enter the account number you want the new user added to by either entering the number in the search field or selecting **Account Lookup**. This option allows you to search for an account by name, number, company number, bill-to phone number or account contact phone number.



The screenshot shows a "Search For Account" dialog box. It features a search field, a "Filter By" dropdown menu, and a "Search" button. The dropdown menu is open, showing options: "Account Name", "Account Number", "Company Number", "Account Bill to: Phone Number", and "Account Contact: Phone Number". A "Cancel" button is at the bottom right.

- 2 Enter the appropriate details in the Search field and then click **Search**.
- 3 The page will refresh with the account details. Select the appropriate account by highlighting it and click **Continue**.
- 4 A **Set Up New Owner** form will appear. The company and billing account information will be pre-populated.

- 5 Within the Owner Information section, provide the details for the new user in the required fields (indicated by red asterisks), as well as any optional information in the remaining fields.

> Manage My Account > Set Up New Owner

Set Up New Owner

Complete this form to set up a new Owner profile

COMPANY AND BILLING ACCOUNT INFORMATION

Company Name:	InterCall UK	
Company Number:	14800	*
Account Name:	InterCall UK	
Account Number:	51036	*

OWNER INFORMATION

* = Required Fields

Prefix:

* First Name: *

* Last Name: *

Middle Initial:

Position:

* Address 1:

Address 2:

Address 3:

* City:

* State/Province:

- 6 If the new owner prefers their owner information be sent to an assistant, check the box to send an assistant the information.
- 7 Your screen will refresh with fields for the assistant's details. Provide the required information (indicated by red asterisks).
- 8 If needed, provide a Project Account Code (PAC code). This provides a method for you to identify your conference calls. These PAC codes are individual accounting codes so you may bill the appropriate department/cost center, or you can use these codes for billing purposes or to track departmental conference calls.
- 9 Select Marketing Settings for the new user and check **Copy Assistant** if the assistant should receive the new user's marketing information as well. If there are others who should receive the new user's marketing materials, check the box to **Send Marketing Materials to Alternate Recipients**.
 - Mail Welcome Packets – Select **Yes** or **No** to indicate if you want welcome packets mailed.
 - Email Welcome Info – Select **Yes** or **No** to indicate if you want welcome information to be delivered via email.
 - Secure Email – Select **Yes** or **No** to indicate if codes/usernames and PINs/passwords should be delivered in two separate emails.

- Email Systems Messages – Select **Yes** or **No** to indicate if you want this user to receive system messages regarding product changes and upgrades delivered via email.
- Conferencing Compass – Select whether this user will receive emails on how to use our services.
- Educational – Select **Yes** or **No** to indicate if the user will receive newsletters and surveys to learn more about our services and provide feedback.
- Webinars/Training – Select **Yes** or **No** to indicate if the user should receive information on training sessions about our services.
- Promotional – Select whether the user should receive information on special offers and pricing discounts.
- Protect From Reset – Select **Yes** or **No** to indicate if you want this user to have his Marketing Materials options updated if updates are made to the account or company level settings.
- Copy Assistant – Check if this user’s assistant should also receive copies of marketing materials. The Assistant Information section must be completed prior to making this selection.
- Language Preference – Select from the drop down menu to indicate what language should be used for communications to this user.
- Email Address Change Notification – Select **Yes** or **No** to indicate if the user should receive an email if the email address is changed on their owner profile.
- Email Format – Select the format of the emails that the user will receive.

MARKETING SETTINGS

Please note if no selection is made default settings will be used.

Notification Type:

Mail Welcome Packets : Yes No

Email Welcome Info : Yes No

Secure Email : Yes No ?

Email System Messages : Yes No

Conferencing Compass : Yes No ?

Educational : Yes No ?

Webinars/Training : Yes No ?

Promotional : Yes No ?

Protect From Reset : Yes No

Options

Copy Assistant :

Language Preference : English

Email Address Change Notification : Yes No

Email Format :

I would like to receive HTML emails

I would like to receive text only emails

I would like to receive multipart emails ?

10 Click **Continue** to proceed.

11 Choose the conferencing services and product details that will be available to your new users.

Please note: When selecting a Call Type, your screen will refresh to include additional fields that allow you to make feature selections associated with that call type.

A description of all the product features that appear on the screen is available in the Appendix to this guide.

> Manage My Account > View/Edit Owner Information


Set Up New Owner

Complete this form to set up a new Owner profile

CALL TYPE

<input type="checkbox"/> Operator Assisted/Toll-Free	<input type="checkbox"/> Reservationless-Plus/Toll-Free	<input type="checkbox"/> Direct Event/Toll-Free
<input type="checkbox"/> Operator Assisted/Toll	<input type="checkbox"/> Reservationless-Plus/Toll	<input type="checkbox"/> Direct Event/Toll
<input type="checkbox"/> Automated/Toll-Free	<input type="checkbox"/> Set Automated As Reservationless	<input type="checkbox"/> Dial-Out (DO)
<input type="checkbox"/> Automated/Toll		

WEB CONFERENCING

<input type="checkbox"/> Live Meeting	<input type="checkbox"/> InterCall Unified Meeting 	
<input type="checkbox"/> MeetingCenter	InterCall Unified Meeting User Login	<input type="text"/>
<input type="checkbox"/> InterCall Web Meeting	InterCall Unified Meeting Password	<input type="text"/>

Reservationless-Plus®

Our Reservationless-Plus (toll and toll-free) service allows you to access an audio conference call at a moment's notice. No reservations required—all you need to initiate a call is your permanent dial-in number, conference code and PIN.

- 1 Select **Reservationless-Plus/Toll-Free** and/or **Reservationless-Plus/Toll**. As seen below, your screen will refresh to include selectable features available with this service.
- 2 We recommend that you leave the conference code and leader PIN fields blank and the system will assign numbers when you save the profile.

RESERVATIONLESS-PLUS		
Conference code:	<input type="text" value="111111111"/>	
Leader Pin:	<input type="text" value="1111"/>	
Dial Out - allow Leader dial out to participants:	<input type="text" value="ON"/>	
Monthly Port Selection:	<input type="text" value="1-25"/>	
Entry Announcement:	<input type="text" value="Entry Tone"/>	
Exit Announcement:	<input type="text" value="Exit Tone"/>	
Security passcode:	<input type="text" value="OFF"/>	
Quick Start:	<input type="text" value="OFF"/>	
Auto Continuation - call continues after Leader disconnects:	<input type="text" value="ON"/>	
PAC via DTMF/telephone keypad:	<input type="text" value="OFF"/>	
Conference Record:	<input type="text" value="ON"/>	
Prompt Set:	<input type="text" value="English(US) Shortened"/>	
Continuation - Allows Leader to change auto continuation settings during call:	<input type="text" value="ON"/>	
Global Access:	<input type="text" value="ON"/>	
Operator Request:	<input type="text" value="Leader and Participants"/>	
Name Record:	<input type="checkbox"/> On <input type="checkbox"/> Name Record changeable via telephone keypad	
Post Conference Emails - monthly fee applicable if turned ON:	<input type="text" value="Yes"/>	
Sub-Conferencing:	<input type="text" value="ON"/>	
Waiting Room:	<input checked="" type="checkbox"/> ON <input type="checkbox"/> Configurable	
Personal Greeting:	<input type="text"/>	

Operator Assisted

Operator Assisted conferencing (toll and/or toll-free) is a reservation-based service that offer customers audio conferencing service with the personal assistance of an operator and support personnel who manage high-touch features.

- 1 For Operator Assisted functionality, select **Operator Assisted/Toll-Free** and/or **Operator Assisted/Toll** Your screen will refresh to include the following areas that allow you to select additional features associated with an Operator Assisted conference call.
- 2 Choose from the Operator Assisted default options for your new user.

CALL TYPE		
<input checked="" type="checkbox"/> Operator Assisted/Toll-Free	<input type="checkbox"/> Reservationless-Plus/Toll-Free	<input type="checkbox"/> Direct Event/Toll-Free
<input type="checkbox"/> Operator Assisted/Toll	<input type="checkbox"/> Reservationless-Plus/Toll	<input type="checkbox"/> Direct Event/Toll
<input type="checkbox"/> Automated/Toll-Free	<input type="checkbox"/> Automated/Toll	<input type="checkbox"/> Dial-Out (DO)
<input type="checkbox"/> Set Automated As Reservationless		
DEFAULT OPTIONS		
<input checked="" type="radio"/> Direct Entry <input type="radio"/> Music Hold		
<input type="checkbox"/> Name Announce	<input type="checkbox"/> Entry Tone Notification	<input type="checkbox"/> Custom Scripting
<input type="checkbox"/> Polling	<input type="checkbox"/> Rollcall	<input type="checkbox"/> Exit Tone Notification
<input type="checkbox"/> Broadcasting	<input type="checkbox"/> Lecture	<input type="checkbox"/> Question & Answer
<input type="checkbox"/> International Link	<input type="checkbox"/> Email Confirmation	<input type="checkbox"/> Security
<input type="checkbox"/> Approved Participant List	<input type="checkbox"/> Fax Confirmation	<input type="checkbox"/> Password <input type="text"/>
<input type="checkbox"/> Leader View	<input type="checkbox"/> Voice Talent <input type="text" value="English"/>	<input type="checkbox"/> Call Transcription <input type="text" value="Entire"/>
<input type="checkbox"/> Sub-Conference		Delivery Method <input type="text" value="Standard"/>
Leader Order	<input type="text" value="Normal Entry"/>	
Event Services	<input type="text" value="None"/>	
Promotion Tape	<input type="text" value="Please Select"/>	
Record/Playback	<input type="text" value="Please Select"/>	
ENHANCED FEATURES		
Special Enunciator <input type="checkbox"/>	UK/HK Comm Link <input type="checkbox"/>	
Communication Line <input type="checkbox"/>	Tape Recording <input type="checkbox"/>	

Direct EventSM

Direct Event (toll and toll-free) provides streamlined conference entry on event calls by allowing participants to join in an automated manner while continuing to offer conference leaders the high-touch experience provided by an operator.

- 1 Select **Direct Event/Toll-Free** and/or **Direct Event/Toll**. Your screen will refresh to include the same default options and enhanced features areas as an Operator Assisted call.
- 2 Because participants join Direct Event calls through an automated process, the user will need to have a leader passcode and participant passcode added to his profile.

Automated

Automated conferencing allows you to make a reservation for your call and conduct it without the assistance of an operator.

- 1 Select **Automated/Toll-Free** and/or **Automated/Toll**. As seen below, your screen will refresh to include selectable features available with this service.
- 2 Select the entry and exit options for the new user.
- 3 Because participants join an Automated call through an automated process, the user will need to have a leader passcode and participant passcode added to their profile. You can select to have the same passcode available for each Automated call you schedule or a unique code for each call.
- 4 Choose whether to have participant names recorded when they enter the call and if the call leader will enter a PAC code using the telephone keypad.

CALL TYPE		
<input type="checkbox"/> Operator Assisted/Toll-Free	<input type="checkbox"/> Reservationless-Plus/Toll-Free	<input type="checkbox"/> Direct Event/Toll-Free
<input type="checkbox"/> Operator Assisted/Toll	<input type="checkbox"/> Reservationless-Plus/Toll	<input type="checkbox"/> Direct Event/Toll
<input type="checkbox"/> Automated/Toll-Free	<input checked="" type="checkbox"/> Automated/Toll	<input type="checkbox"/> Dial-Out (DO)
<input type="checkbox"/> Set Automated As Reservationless		

RESERVATIONLESS-EXPRESS & AUTOMATED	
Automated Entry Announce	Entry Tone <input type="button" value="v"/>
Automated Exit Announce	Exit Tone <input type="button" value="v"/>
Automated Unique Passcode	<input checked="" type="radio"/> Off <input type="radio"/> Leader Only <input type="radio"/> Leader & Participant
Leader PassCode	<input type="text"/>
<input type="checkbox"/> Add Participant Passcode	<input type="text"/>
Prompt Set	English (US/CA) <input type="button" value="v"/>
Automated Name Record	<input type="checkbox"/> Name Record On <input type="checkbox"/> Name Record Changeable via DTMF
	<input type="checkbox"/> Phone PAC

Other Call Type Options

From the Call Type section, you can also select **Dial-Out (DO)** as an option (this is only applicable if you also select Operator Assisted) and **Set Automated As Reservationless** for the new user.

Web Conferencing

Select web conferencing default options for the new user.

- + **Microsoft® Office Live Meeting, offered by InterCall** – host interactive, collaborative meetings by showing presentations, software and web sites.
- + **Cisco WebEx™ Meeting Center, provided by InterCall**– use the Internet to share a PowerPoint® presentation, demonstrate software or show web site navigation.
- + **InterCall Unified Meeting** – lets you collaborate during your online meetings with a single system that brings together audio, web and video conference tools. A Reservationless-Plus account is required prior to selecting this service.
- + **LotusLive** – share anything on your computer with other users. There are no downloads required for your participants to join your meeting.

View/Edit Owner Information

View and edit owner information for yourself and others who fall under the company or account you manage.

- 1 Click **View/Edit Owner Information**.
- 2 To view or edit your own profile, click **View/Edit Your Owner Profile**. To view or edit the profile for a user listed under you, search for the user by owner number, owner last name, account number, etc.

› Manage My Account › View/Edit Owner Information

View/Edit Your Owner Information

[View Edit Your Owner Profile](#)

Search For Owner

Please use the search function below to find the Owner you would like to view or edit. Search results will be displayed below. To view or edit an Owner profile, highlight the name and click **Continue**.

Search: Filter By:

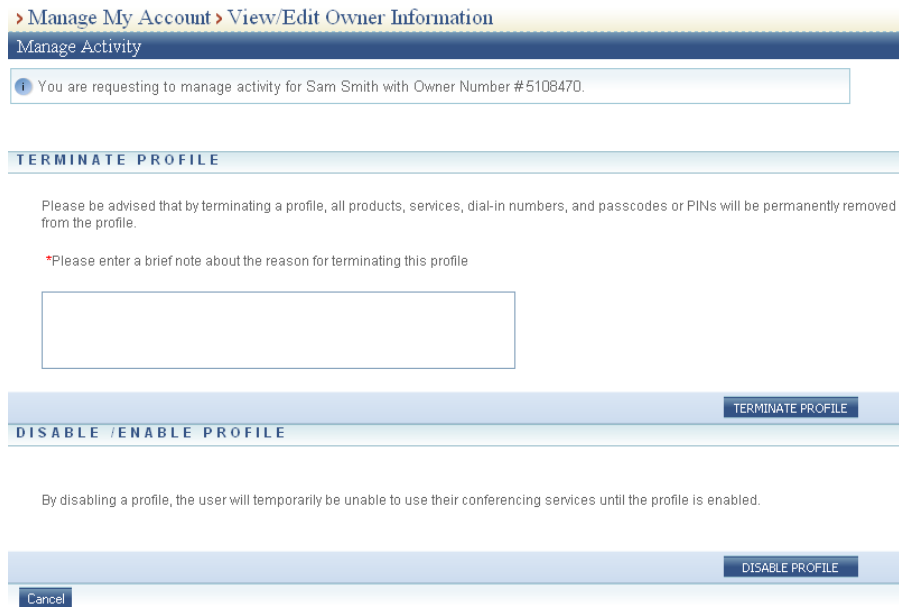
- 3 Your screen will refresh with the owner search results. Select the owner whose profile you would like to view or edit and click **Continue**. You may download the results to your desktop by selecting **Export to CSV**.
- 4 The owner profile will now appear and will provide details including the company, account and owner information related to this owner profile. To change any of this information, simply update the appropriate fields. When finished making changes to the profile, click **Save Changes**.
- 5 Click **View Product Details** to make any updates to the owner's product profile. When finished making changes to the profile, click **Save Changes**.
- 6 You will receive a confirmation page to confirm your owner profile details. Ensure the information is correct and click **Continue** to save.

Please note: You can switch to another owner at any time during the above steps by selecting the **Update Another Owner** tab at the bottom of your screen or by clicking **Act as delegate for another user** at the top of the screen.

Delete or Disable an Owner

You can terminate or disable any owner profile except your own.

- 1 Click **View/Edit Owner Information**.
- 2 Search for the user by owner number, owner last name, account number, owner's alternate telephone number, assistant's telephone number or owner's alternate recipient telephone number.
- 3 Your screen will refresh with the owner search results. Select the owner whose profile you would like to terminate/disable and click **Continue**.
- 4 The owner profile will now appear. Scroll to the bottom of the screen and select **To Manage Activity**.
- 5 You have the option to terminate the owner's profile by permanently removing their dial-in numbers, conference codes, etc. Or you can choose to disable their profile, temporarily removing the ability to utilize their conferencing service, but without permanently deleting their access details.



> [Manage My Account](#) > [View/Edit Owner Information](#)

Manage Activity

i You are requesting to manage activity for Sam Smith with Owner Number #5108470.

TERMINATE PROFILE

Please be advised that by terminating a profile, all products, services, dial-in numbers, and passcodes or PINs will be permanently removed from the profile.

*Please enter a brief note about the reason for terminating this profile

TERMINATE PROFILE

DISABLE /ENABLE PROFILE

By disabling a profile, the user will temporarily be unable to use their conferencing services until the profile is enabled.

DISABLE PROFILE

Cancel

- 6 If you want to terminate a profile, enter a brief note in the text box and click **Terminate Profile**. Verify that you want to remove the conferencing details. A pop-up will appear on the screen confirming that the owner's conferencing details will be terminated. Their contact details do remain on our system.
- 7 If you want to temporarily disable a profile, click **Disable Profile** and verify your action. A pop-up will appear on the screen confirming that the owner's conferencing account has been disabled.
- 8 To re-enable the account, go back into their owner profile and select **To Manage Activity**. Click **Enable Profile**.

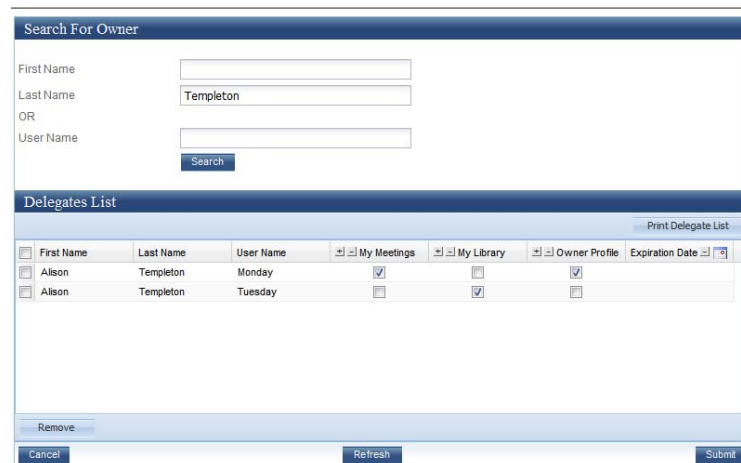
Manage Delegates

Add, edit or delete delegates who have access to your InterCall Online account. If you provide someone delegation rights to your InterCall Online account, they will be able to schedule your calls, start your calls and access your library of stored material. They can also manage your account on your behalf.

This is only available to you if, as an administrator, you also have a conferencing account.

ADDING NEW DELEGATES

- 1 To add a new delegate, input either the first name, last name or InterCall Online user name and then click **Search**.
- 2 You will be provided a list of available users from your company. Select the user you want and click **Add Selected User to Delegate List**.
- 3 Choose the roles for your new delegate, i.e., My Meetings, My Library or Owner Profile, by choosing the checkbox in the appropriate column.
- 4 Click **Submit** to save.



<input type="checkbox"/>	First Name	Last Name	User Name	<input type="checkbox"/> My Meetings	<input type="checkbox"/> My Library	<input type="checkbox"/> Owner Profile	Expiration Date
<input type="checkbox"/>	Alison	Templeton	Monday	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Alison	Templeton	Tuesday	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

EDITING EXISTING DELEGATES

All delegates who have already been selected are listed on the page with each delegate's role assignment and expiration date. By selecting the checkbox beside the delegate's name, you may:

- + Select or deselect role management options, i.e., My Meetings, My Library and Owner Profile.
- + Delete selected delegates.
- + Change the expiration date for all selected delegates.

i Name Search
Please use the search function to find the Delegate that you would like to view/edit.
Search results will be displayed below.

Search For Owner

First Name

Last Name

OR

User Name

Delegates List

[Print Delegate List](#)


<input type="checkbox"/>	First Name	Last Name	User Name	<input type="checkbox"/> My Meetings	<input type="checkbox"/> My Library	<input type="checkbox"/> Owner Profile	Expiration Date <input type="checkbox"/>
<input type="checkbox"/>	Alison	Templeton	Monday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Set Up a New Billing Account Profile

Establishing a new Billing Account Profile will allow you to have usage combined on a single invoice for multiple owners or you may establish a new Billing Account Profile to be used by a single owner. The Billing Account Profile will contain the contact and address information to be used for invoice delivery for this billing account.

- 1 Click **Set Up a New Billing Account Profile**.
- 2 The Company Name and Company Number fields are pre-populated. Provide an account name for the new profile in the appropriate field.
- 3 Check **Read Only Access**, if you want all users set up within this account to have read only access to the Manage My Account section of InterCall Online. They will be able to view their conferencing details, but not edit them.
- 4 Select the invoice delivery method: **Mail**, **Email Invoice** or **Email Link**.
- 5 In the Billing Contact area, provide the required information (indicated with red asterisks).

Set Up a New Billing Account Profile


 Click Save Changes to store your changes


COMPANY WHERE BILLING ACCOUNT PROFILE IS TO BE ADDED

* -Required Fields

Company Number: 14800

Company Name: InterCall UK

* Account Name: 

Read Only Access: 

INVOICE DELIVERY METHOD

Invoice Delivery Method: MAIL

BILLING CONTACT

* First Name:

* Last Name:

* Address 1:


Address 2:

Address 3:

* Country: United States

* City: * State/Province: AK

* ZIP/Postal Code:

* Telephone: Ext. 

* Email:

- 6 In the Account Contact section, provide the required information (indicated with red asterisks).
- 7 If you would prefer to pay by credit card, check **Credit Card Information**. Your screen will refresh.
- 8 Provide the required credit card information (indicated with red asterisks).
- 9 Once approved, monthly usage for this account will be automatically billed to this credit card.
- 10 From the Owner Sign Up Settings section, you can enable and determine the username and password for the Sign Up Now functionality on the login page. This allows new users associated with this billing account to sign up for an owner account by simply providing the username and password determined by you.

Select **Enabled** from the Owner Setup drop down menu to activate Sign Up Now.
- 11 Provide a username, password and re-type your password to confirm.
- 12 Select **Owner Setup Type – Manual** (you will need to approve the new owner) or **Automated** (the new owner's account is automatically approved).

ACCOUNT CONTACT	
* First Name	<input type="text"/>
* Last Name	<input type="text"/>
* Address 1	<input type="text"/>
Address 2	<input type="text"/>
Address 3	<input type="text"/>
* Country	United States <input type="text"/>
* City	<input type="text"/> * State/Province AK <input type="text"/>
* ZIP/Postal Code	<input type="text"/>
* Telephone	<input type="text"/> Ext. <input type="text"/> i
Fax	<input type="text"/>
* Email	<input type="text"/>
<input type="checkbox"/> CREDIT CARD INFORMATION	
OWNER SIGN UP SETTINGS	
Owner Setup	Disabled <input type="text"/>
Username	<input type="text"/>
Password	<input type="text"/>
Confirm Password	<input type="text"/>
Owner Setup Type	Manual <input type="text"/>

- 13 Provide the additional information required to set up the new billing account.
- 14 Select a SIC Code (Standard Industrial Classification Code) from the drop down menu. This allows us to determine the industries in which our customers reside and help us to meet specific needs of those industries.
- 15 Select **Yes** or **No** from the drop down menu to determine whether or not a PAC code (Project Accounting Code) is required for all owners. If Yes, provide the PAC code label, i.e., cost center, department number, in the appropriate field.
- 16 Determine the **Marketing Settings** for the new billing account profile:
 - Mail Welcome Packets – Select **Yes** or **No** to indicate if you want welcome packets mailed.
 - Email Welcome Info – Select **Yes** or **No** to indicate if you want welcome information to be delivered via email.
 - Secure Email – Select **Yes** or **No** to indicate if codes/usernames and PINs/passwords should be delivered in two separate emails.
 - Email Systems Messages – Select **Yes** or **No** to indicate if you want this user to receive system messages regarding product changes and upgrades delivered via email.
 - Conferencing Compass – Select whether this user will receive emails on how to use our services.
 - Educational – Select **Yes** or **No** to indicate if the user will receive newsletters and surveys to learn more about our services and provide feedback.
 - Webinars/Training – Select **Yes** or **No** to indicate if the user should receive information on training sessions about our services.

- Promotional – Select whether the user should receive information on special offers and pricing discounts.
 - Protect From Reset – Select **Yes** or **No** to indicate if you want this user to have his Marketing Materials options updated if updates are made to the account or company level settings.
 - Copy Assistant – Check if this user's assistant should also receive copies of marketing materials. The Assistant Information section must be completed prior to making this selection.
 - Language Preference – Select from the drop down menu to indicate what language user should be used for communications to this user.
 - Email Address Change Notification – Select **Yes** or **No** to indicate if the user should receive an email if the email address is changed on their owner profile.
 - Email Format – Select the format of the emails that the user will receive.
- 17 Click **Submit** to save your changes.
 - 18 You will receive a confirmation page showing the information you provided. Ensure this information is correct and click **Continue** to save your changes.

View/Edit Account Information

View and edit account information for billing accounts within your company.

- 1 To view or edit a profile for a billing account, search for the account(s) by account name, account number, company number, account bill-to phone number or account contact phone number.
- 2 Your screen will refresh with your account information search results. Select the account name you would like to view and/or edit.
- 3 The account profile information will now appear. You can update any of the information on the page except the company and account name/number. Once your changes are complete, click **Save Changes**.
- 4 You will receive a confirmation page. Ensure your information is correct and then click **Continue** to save your changes.

View/Edit Company Information

View and edit your company information from InterCall Online.

- 1 Select **View/Edit Company Information**.


If you are the administrator for only one company, the screen will automatically show your company profile information page, please skip to step 4. If you are the administrator for more than one company, please follow the steps below.

- 2 If you are responsible for more than one company, complete a search by company name or company number to view or edit a company profile.

- 3 Your screen will refresh with your search results. Select the company name you would like to view and/or edit.
- 4 The company profile information will now appear. You can change the available options, i.e., PAC required for all owners, marketing settings and view your rate and invoice currency.


[> Manage My Account > View/Edit Company Information](#)

View/Edit Company Information for: InterCall UK

 Click Save Changes to store your changes


COMPANY INFORMATION

* = Required Fields

Business Unit:	USA
Division :	InterCall US
* Company Name:	<input type="text" value="InterCall UK"/>
Billing Type:	<input type="text" value="No Preference"/>
Require Credit Card:	<input type="checkbox"/>
PAC required for all owners:	<input type="text" value="Yes"/>
PAC:	<input type="text"/>
* Client Source:	<input type="text" value="Unknown"/>
If Other, please specify:	<input type="text"/>
Reservationless-Plus Security Passcode	<input type="text" value="OFF"/>
Auto Provision InterCall Unified Meeting:	<input type="checkbox"/>
Read Only Access :	<input checked="" type="checkbox"/> 
Leader Pin and Passcode rules validation exemption :	<input type="checkbox"/>
Global Access:	<input type="text" value="OFF MANDATORY"/>

- 5 Choose other options, including: user lock-out, leader PIN expiration and InterCall Online password expiration. By default, InterCall Online passwords expire every 30 days and users of the site must select a new password. As an administrator, you can change the default for your company from 30 days to 60 or 90 days, or turn the feature off entirely.

LEADER PIN EXPIRATION

Expire ResPlus Leader Pin?:	<input type="text" value="No"/>
Expiration Interval:	<input type="text" value="0"/> 

PASSWORD EXPIRATION

Password Expiration:	<input type="text" value="ON"/>
Expiration Interval:	<input type="text" value="30"/>
Expiration Reminder:	<input type="text" value="10"/>

- 6 Once you complete your changes, click **Save Changes**.
- 7 You will receive a confirmation page. Ensure your information is correct and click **Continue** to save your changes.

Administrator Roles

Define roles in InterCall Online for users within your organization.

- 1 Select **Administrator Roles**.

Instructions: Admin User Roles

Search for a user

Please use the search function below to find the username you would like to view or edit. Search results will be displayed below. To view or edit a Username, select the row and click the View Role Details button. Or, select "Resend Password" to allow the user access to reset their password.

User Name

- 2 If you are unsure of the exact username, you may search for a user by using the asterisk (*) as a wildcard. If you know the username of the owner, enter the exact name in the User Role field. Click **Search**.
- 3 You will receive the search results. Highlight the username that would like to view and or edit.
- 4 Select **View Role Details**.
- 5 When you have accessed the owner’s roles, you may add or delete multiple roles for multiple company or account numbers. The Role Groups are as follows:
 - Admin Invoice Viewing – allows the owner to view invoices for the company or account number to which he has been assigned.
 - Admin Report Viewing – allows the owner to view reports for the company or account number to which has been assigned.
 - CRM Management – allows the owner to create new owners, view and edit owner information for the company or account number to which he has been assigned.

Approve New Owner Requests

View new requests for owner accounts that have been submitted through the Sign Up Now owner set-up process. View your requests and accept or reject these new owner requests. Upon approving the request, accounts will be automatically created and welcome materials will be sent to the new owner.

- 1 Select **Approve New Owner Requests**.

> Manage Your Account > Approve New Owner Requests

Please approve or reject new owner requests below. You may select multiple items. To view details of a request, click on the Owner Name link.

Approve New Owner Requests

Owner Name	Tracking Id	Requested Date
n.p.	313	05/23/2008

Approve Checked Owners Reject Checked Owners

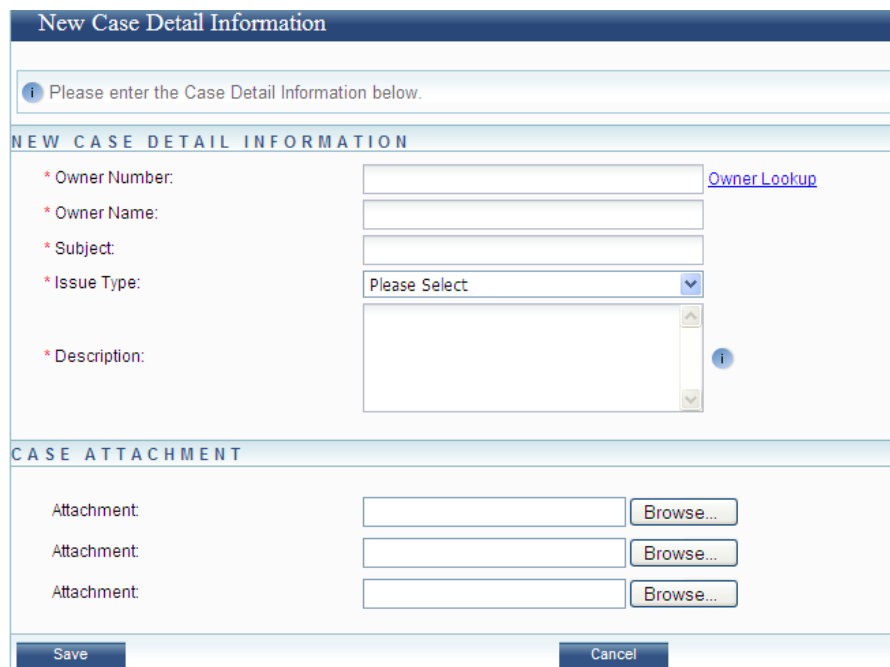
- 2 You may select one or more users by highlighting the owner name and choosing either **Approve Checked Owners** or **Reject Checked Owners**. You will receive a confirmation that the selected owners have been approved or rejected.

Manage Trouble Tickets

As an administrator, you can enter trouble tickets for your own conferencing experience or manage tickets for others within your organization.

ENTERING A NEW TICKET

- 1 Go to the Customer Support page.
- 2 Click **Trouble Ticket** in the left-hand navigation bare.
- 3 Click **New Case**.
- 4 Search for the owner number requiring a trouble ticket by using the Owner Lookup option.
- 5 Complete the online form and click **Save**.
- 6 You will receive an email confirmation that your request has been submitted along with the case number for tracking purposes.



New Case Detail Information

Please enter the Case Detail Information below.

NEW CASE DETAIL INFORMATION

* Owner Number: [Owner Lookup](#)

* Owner Name:

* Subject:

* Issue Type:

* Description:

CASE ATTACHMENT

Attachment:

Attachment:

Attachment:

EDITING AN EXISTING TICKET

- 1 Go to the Customer Support page.

- 2 Click **Trouble Ticket** in the left-hand navigation bar.
- 3 By using the search criteria you can search by company, account or owner number. You can also search for a particular case if you have that information available.
- 4 The table will display the owner details, issue type (audio, web, video or billing), when the case was entered and its status.

Trouble Tickets

All open and closed cases are listed below.

Case Search

Filter By: Criteria:

RECENT CASES

Case Number	Owner Name	Owner Number	Issue Type	Subject	Date/Time Op...	Status	Date/Time Closed	<input type="button" value="New Case"/>
02558668	Alison Templeton1	1552282	Billing	Test 123	Fri Sep 17 20...	Closed	Fri Sep 17 2010 1...	
02558663	Alison Templeton1	1552282	Web	Test 123	Fri Sep 17 20...	Closed	Fri Sep 17 2010 1...	

Page 1 of 1 | Displaying Results 1 - 2 of 2

- 5 Highlight the appropriate case on the screen and click **Edit/View Case** for more details about the ticket.

Appendix: Product Option Descriptions

A. AUTOMATED

Leader passcode: The code you enter to start your call.

Participant passcode: The code entered by your participants to join your call.

Automated unique passcode: A new passcode is assigned to each of your automated calls.

Entry Announce: Select how you want your participants joining a call to be announced. Choose from the following options: tone, name announce, name and tone or silence.

Exit Announce: Select how you want your participants disconnecting from a call to be announced. Choose from the following options: tone, name announce, name and tone or silence.

B. RESERVATIONLESS-PLUS

Conference passcode: The unique passcode you provide to your participants so they may join your call. You may provide a custom passcode in this field or leave it blank and the system will assign a random number.

Leader PIN: The code you enter to start your Reservationless-Plus conference. You may provide a custom leader PIN or leave the field blank and the system will assign a random code.

Dial-Out: Select ON or OFF to determine whether or not your participants can be dialed out to.

Monthly Port Selection: Select the number of participant lines that your account can accommodate on your Reservationless-Plus calls.

Entry Announcement: Decide how your participants are announced when they join your audio conference call. Choose from the following options: tone, name announce, name and tone or silence.

Exit Announcement: Decide how your participants are announced when they leave your audio conference call. Choose from the following options: tone, name announce, name and tone or silence.

Security Passcode: Provide an added level of security for your audio conference by having greater control over who joins. You can select and distribute the security passcode for every conference you host. Note: This feature must be OFF if Quick Start is enabled.

Quick Start: Select Quick Start to immediately begin your reservationless conference call by allowing your participants to enter your conference before you

join and start speaking before the call officially begins. Note: This feature must be OFF if Security Passcode is enabled.

Auto Continuation: This feature allows a Reservationless-Plus conference to continue if you disconnect. This option can be turned ON or OFF.

PAC via DTMF/telephone keypad: When enabled, this feature prompts you to enter a Project Accounting Code (PAC) using your telephone keypad prior to starting your conference call. This option can be turned ON or OFF.

Recorder Dial-Out/Conference Record: Record your conference by pressing *2 on your telephone keypad. This option can be turned ON or OFF.

Prompt Set Language: Select which language the call prompts will be spoken in.

Continuation: Use DTMF tones during a call to allow the conference to continue if you disconnect. This option can be turned ON or OFF.

Operator request: Select who can request an operator to attend your call.

Name record: Decide whether your participants will record their name as they enter the call.

Post-Conference Emails: Keep an attendance roster of your participants with an email record of which participants were on the phone and/or web. Also, keep track of your total conferencing minutes to anticipate your call's budget. A monthly fee is applicable if this option is turned ON.

Sub-conferencing: Allow pre-selected guests to join a private discussion during your conference call. Sub-conferencing allows you to discuss side issues and other non-public information. This option can be turned ON or OFF.

Waiting Room: Have your participants placed on music hold until you are ready for them to join the conference call. This feature is helpful when you have two back-to-back conferences scheduled with two different groups. This option can be turned ON or OFF.

Allow Multiple Leaders: Pre-select participants to have access to your keypad commands. This option can be turned ON or OFF.

Personal Greeting: Record a personal message to be played before the participant is placed into conference. Monthly charges apply.

C. OPERATOR ASSISTED AND DIRECT EVENT OPTIONS

DEFAULT OPTIONS

Direct Entry: Select Direct Entry to quickly join an audio conference. It allows participants to immediately enter the conference and start speaking before the call officially begins.

Music Hold: Place participants on music hold until the teleconference begins. Music Hold creates a formal atmosphere for the conference.

Name Announce: Have participants' names announced by an operator as they join the conference, letting everyone know who is on the call. Name Announce makes it easy for you to keep track of your call's audience.

Polling: Use the operator to survey all conference participants. You determine the questions prior to the conference and participants respond using their telephone keypads. Polling allows you to collect instant feedback and increases participants' involvement in the call. You receive a report with all responses that is organized by question and participant.

Broadcasting: Select to have a broadcast message sent to your participants outside of your conference call.

International Link: Connect your international participants to your conference call, including links through international call centers, toll and toll-free access numbers and dial-out options.

Approved Participant List: Indicate which of your participants are scheduled to be on your conference and at what time during the call. Only those on the list will be joined to the conference.

Leader-ViewSM: Get a private, real-time view of the participants on your call using this simple, web-based interface. You can view the names of individuals waiting to ask a question and other pertinent information. Leader-View effectively manages investor relations and other public conferences.

Sub-conference: Allow pre-selected guests to join a private discussion before the conference begins. Sub-conference lets you review last minute details, side issues and other non-public information.

Entry Tone Notification: Hear a tone whenever a new participant enters the teleconference. It lets everyone know that a new participant has joined or left the teleconference without interrupting the conversation.

Roll Call: Have the operator broadcast the names of all participants who have joined the call. Roll Call confirms that all expected participants are in attendance.

Lecture Mode: Mute all guests' lines during the presentation to reduce background noise allowing you to deliver your message uninterrupted.

Email Confirmation: Double-check the specifics of your teleconference. You can choose to receive a confirmation of your conference details via email.

Fax Confirmation: Double-check the specifics of your teleconference. You can choose to receive a confirmation of your conference details via fax.

Voice Talent: Use screened and trained operators to provide voice-over quality talent, lending a professional touch to high-profile conferences. Voice Talent is beneficial for media-facing events or conferences hosted by your firm's upper management.

Custom Scripting: Craft a special message for a welcome statement, Q&A session and/or closing comments. Your script is read by the operator during your conference. Custom Scripts offer you another way to personalize your calls.

Exit Tone Notification: Hear a tone whenever a new participant enters or exits the teleconference. It lets everyone know that a new participant has joined or left the teleconference without interrupting the conversation.

Question & Answer: Give your participants the opportunity to ask questions during the conference. Participants indicate that they have a question using their telephone keypads, while the operator manages the question queue in a professional and orderly fashion.

Security: You can prevent additional participants, including the operator, from joining the conference by pressing a command on your telephone keypad. Conference Lock gives you the freedom to discuss confidential information in a secure environment. Selecting this feature will alert the operator to review the Conference Lock function with you prior to being placed into your conference.

Password: Participants must provide the operator with the pre-determined word or code you provide in the Password field to join the conference.

Call Transcription: Receive a written record, either electronically or in hard copy, of what was said during the conference. Transcriptions are helpful for identifying sound bytes and quotes for post-event press releases. Choose to transcribe the entire call or just the Q&A session. We provide several different delivery options to fit your specific needs.

Leader Order/Entry: Create a friendly atmosphere for the conference by joining the conference before your participants. It gives you the opportunity to greet participants as they enter the call. Alternatively, Leader Last lets you join the conference after everyone else has arrived, creating a formal atmosphere. Leader Last is recommended for large presentations and speaking events.

Promotional Playback: Send InterCall a tape for your participants to hear while they wait for the conference to begin. A promotional tape sets the tone for your call and can provide participants with relevant information about the speaker or conference topic.

Conference Record/Playback: Replay a previously recorded conference or message at one or more scheduled times. Select from CD, cassette, DAT, Encore or microcassette to indicate in which format the conference playback will be delivered.

COUNTRY NUMBER DISPLAY

Select the international dial-in numbers that will display on the email confirmations for your audio calls. By default, no countries are selected for Operator Assisted and Direct Event calls. For Reservationless-Plus and Automated services, 23 default countries automatically display. You can add more countries by selecting a country from the right-hand column and moving it to the Display these Country Numbers column. When you schedule your Automated, Operator Assisted or Direct Event call via InterCall Online, click

Enable International dial-in numbers in the Meeting Information section and the countries you selected will display on your email confirmation.

ENHANCED FEATURES

Special Enunciator: Customize the recording that is heard initially when dialing in for your conference call.

Communication Line: Speak with an operator outside of the main conference to convey behind-the-scenes information, orchestrate guest speakers or give timing cues. A communication line makes it easier to manage a large conference.

UK/HK Comm Link: Allows contacts from Europe or Asia Pacific to speak with an operator outside the main conference to convey behind-the-scenes information to orchestrate guest speakers or give timing cues.

Tape Recording: Capture your event on a CD, cassette, microcassette or DAT to provide you with a high-quality recording of the call for your archives. For easy navigation through your recorded conference, we also provide CD indexing.

ENCORESM OPTIONS

Encore: Digitally record your call for those who were unable to attend it live or would like to listen again. The recording is accessible 24/7 by dialing a toll-free number.

Encore Security Code: To access your Encore recording, guests will be required to enter the Encore Security Code.

PARTICIPANT REPORT

Participant Report: Participants' names, on-the-line times, phone numbers and up to four additional pieces of information you selected are captured as they dial into the conference. This list is faxed or emailed to you following your call. Choose a default from the following:

- **Standard** – Participant's first and last name.
- **Enhanced** – Participant's first and last name, phone number and two additional pieces of information of your choice. If selected, add the additional requested information you desire into fields 3 and 4.
- **Premium** – Participant's first and last name, phone number and four additional pieces of information of your choice. If selected, add the additional requested information you desire into fields 3 to 6.

Lastly, provide a recipient name and an email and/or fax number for the report to be delivered.