



# InterCall Online User Guide

## Administrator Reports and Invoices



### For more information:

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

Canada:  
877.333.2666  
www.intercall.ca

Numerous types of audio and web activity reports are available from InterCall Online to help you keep track and analyze your conferencing usage. As an administrator, you have access to run reports for all owners within an account under your company or the entire organization.

After logging into your InterCall Online account, select **Reports** from the left-hand navigation bar.

Reporting

Select a report to view.  
[Billing Codes List](#)  
[Feature Codes List](#)

REPORTS

- [Greatest Attributes Report](#)
- [Audio Activity Reports](#)
- [Web Activity Reports](#)
- [Stewardship Report](#)
- [Minute Report](#)
- [Online Reports](#)
- [InterCall Unified Meeting Reports](#)
- [Live Meeting Reports - Meeting List](#)
- [Live Meeting Reports - Recording List](#)
- [Meeting Center Reports](#)

Please note: If you are an administrator with an InterCall account, you will have access to web conferencing reports relating to your services. If you do not have an InterCall account, the web conferencing services reports, i.e., Microsoft® Office Live Meeting, offered by InterCall, Cisco WebEx™ Meeting Center, provided by InterCall, InterCall Unified Meeting®, etc. will not be available to you.

## Greatest Attributes Report

To help you manage your conference users and conferencing budget, you can access information for the top 50 owners or conferences with the highest number of dial-out calls, port overbooking charges, non-cancellation charges and other valuable metrics.

Greatest Attributes Report

Please choose the Reporting Fields you would like to output

CUSTOMIZE YOUR REPORT

Dates (MM/DD/YYYY) 04/01/2008 FROM 04/30/2008 TO

REPORT ITEMS

Pick A Report

- Greatest Number of Conferences
- Most Non-Cancellation Charges
- Greatest Number of Domestic Conference Dial Out's
- Greatest Number of International Conference Dial Out's
- Greatest Number of International Toll-Free Dial In's
- Greatest Conference Cost
- Greatest Port Overbooking

Submit Reset

 InterCall is a subsidiary of West Corporation

AAP/EOE

- 1 Enter **From** and **To** dates via the calendar icons to narrow down the scope of your report.
- 2 Choose a report:
  - Greatest Number of Conferences
  - Most Non-Cancellation Charges
  - Greatest Number of Domestic Conference Dial-Out's
  - Greatest Number of International Conference Dial-Out's
  - Greatest Number of International Toll-Free Dial-In's
  - Greatest Conference Cost
  - Greatest Port Overbooking
- 3 Click **Submit** to run and obtain your report. Your report will only be available to view on screen.

## Audio Activity Reports

Summarize your audio conferencing activity for the last four months of billed data and the current month's data showing estimated charges. You can customize your report by selecting the date or range of dates for which you want to analyze. Further customize your report by selecting from the many categories of information available, i.e., total audio minutes and conference charges. You can select to view your report onscreen in HTML or download to your desktop as an Excel spreadsheet.

Audio Activity Reports

ⓘ Data is 48 hours in arrears. Please note: you will be unable to view usage for the previous month during the bill run (approximately 1st-8th of each month)  
\*Indicates required fields

CUSTOMIZE YOUR AUDIO ACTIVITY REPORT

\* Start Date:  \* End Date:  Output As:

REPORT ITEMS	FILTER (S)
<a href="#">Select All</a> <a href="#">Deselect All</a>	
<input type="checkbox"/> Conference ID	Conference ID <input type="text"/>
<input type="checkbox"/> Billing Status	
<input type="checkbox"/> Invoice Number	Invoice Number <input type="text"/>
<input type="checkbox"/> Status	
<input type="checkbox"/> Rep Code	
<input type="checkbox"/> Company Number *	Company Number <input type="text"/>
<input type="checkbox"/> Company Name	
<input type="checkbox"/> Owner Number	Owner Number <input type="text"/>
<input type="checkbox"/> Owner Name	
<input type="checkbox"/> Owner Phone	
<input type="checkbox"/> Account Number	Account Number <input type="text"/>
<input type="checkbox"/> Conference Date	Conference Date <input type="text"/>
<input type="checkbox"/> Conference Start Time	
<input type="checkbox"/> Conference End Time	
<input type="checkbox"/> Leader Name	
<input type="checkbox"/> Conference Type	
<input type="checkbox"/> PAC Code	PAC Code <input type="text"/>
<input type="checkbox"/> Conference Topic	
<input type="checkbox"/> Lines	

- 1 Enter a **Start Date** and **End Date** for the report you want to obtain.
- 2 Select your type of output: Excel spreadsheet or HTML document.
- 3 Check the appropriate boxes to choose the conference detail you want to include and analyze.
- 4 Click **View Report** to run and obtain your report.

## Web Activity Reports

Review your web conferencing activity for the last four months of billed data and the current month's data showing estimated charges. You can customize your report by selecting the date or range of dates for which you want to analyze. Further modify your report by selecting from the many categories of information available, i.e., total audio minutes and conference charges. You can choose to view your report onscreen in HTML or download to your desktop as an Excel spreadsheet.

Web Activity Reports

Data is 48 hours in arrears. Please note: you will be unable to view usage for the previous month during the bill run (approximately 1st-8th of each month)  
\*indicates required fields

CUSTOMIZE YOUR WEB ACTIVITY REPORT

\* Start Date:  \* End Date:  Output As:

REPORT ITEMS	FILTER (S)	
<a href="#">Select All</a> <a href="#">Deselect All</a>		
<input type="checkbox"/> Web Conference ID	Web Conference ID	<input type="text"/>
<input type="checkbox"/> Billing Status		
<input type="checkbox"/> Invoice Number	Invoice Number	<input type="text"/>
<input type="checkbox"/> Status		
<input type="checkbox"/> Rep Code		
<input type="checkbox"/> Company Number*	Company Number	<input type="text"/>
<input type="checkbox"/> Company Name		
<input type="checkbox"/> Account Number	Account Number	<input type="text"/>
<input type="checkbox"/> Owner Number	Owner Number	<input type="text"/>
<input type="checkbox"/> Owner Name		
<input type="checkbox"/> Owner Phone		
<input type="checkbox"/> Conference Date	Conference Date	<input type="text"/>
<input type="checkbox"/> Conference Start Time		
<input type="checkbox"/> Conference End Time		
<input type="checkbox"/> PAC Code	PAC Code	<input type="text"/>
<input type="checkbox"/> Total Participants		
<input type="checkbox"/> Conference Topic		
<input type="checkbox"/> Total Minutes		
<input type="checkbox"/> Retail Charges		

- 1 Enter a **Start Date** and **End Date** for the report you want to obtain.
- 2 Select your type of output: Excel spreadsheet or HTML document.
- 3 Check the appropriate boxes to choose the conference detail you want to include and analyze.
- 4 Click **View Report** to run and obtain your report.

## Stewardship Report

Receive a comprehensive report that provides information on all products, including usage in minutes, costs, conferences and participants for the current calendar year. The report can be run at the company, account or owner levels.



- 1 Select your type of output: Excel spreadsheet or HTML document.
- 2 Choose the level you would like your Stewardship Report to run (company, account or owner) and input the appropriate number.
- 3 Click **View Report** to run and obtain your report.

## Minute Report

Receive information on all products that includes usage of minutes for a specified month. This report can be run at the company, account or owner levels.



- 1 Select the month (only the last four months of billed data is available) for your Minute Report.
- 2 Select your type of output: Excel spreadsheet or HTML document.
- 3 Choose the level you would like the Minute Report to run (company, account or owner) and input the appropriate number.
- 4 Click **View Report** to run and obtain your report.

## Online Reports

If your company subscribes to Online Reports, you can access them through InterCall Online. Online Reports provides access to even more information about your company or billing account's activity. Contact your sales representative if you're interested in becoming a subscriber. You will require a separate username and password to access Online Reports.

**LOGIN**

**Welcome to Online Reports.**  
This site was developed specifically to provide our customers timely, accurate information about their conferencing business. Please direct any questions to your sales representative.

**Information:**  
To sign up for this service, contact your sales representative.

- US customers [click here](#)
- EMEA customers [click here](#)
- Canada customers [click here](#)
- APAC customers [click here](#)

To learn more about Online Reports, download the [Overview Guide](#).

User Name:

Password:

[Forgot Password?](#)

[Updates \(Feb 2008\)](#)

NOTE: This system is to be accessed by authorized users only. System usage is monitored. By continuing to access the system, the user represents that s/he is an authorized user and expressly consents to such monitoring. Users are advised that, if monitoring reveals possible criminal activity, system personnel may provide the evidence gathered to the authorities.

**Service Announcement:**  
If you need assistance with your login information, contact us at:

For US customers:  
877 650 0052 or +1 706 643 9792 or [olsupport@intercall.com](mailto:olsupport@intercall.com)

For EMEA customers:  
0871 7000 170 or +44 (0)1452 546742 (opt 4) or [olsupport@intercalleurope.com](mailto:olsupport@intercalleurope.com)

For Canada customers:  
877 333 2666 or 780 414 6741 or [olsupport@intercall.ca](mailto:olsupport@intercall.ca)

For APAC customers:  
Australia 1800 468 225  
Singapore 1800 468 2255  
International +612 8295 9000 or [olsupport@intercallapac.com](mailto:olsupport@intercallapac.com)

## View Invoices

When using InterCall Online, you can view previous billing account invoices.

**Invoice Search**

Filter By: Company Name      Criteria: Test company 001 i

Company Number	Company Name	Date Created
TEST COMPANY 001		08/07/2008

Drill down to lower levels if needed. Invoices can only be accessed from the Account level.

Page 1 of 1      Displaying Results 1 - 1 of 1

- 1 Select the appropriate filter from the **Filter By** drop-down list (company name, company number, account name or account number) and enter the details in the **Criteria** field.

**Note:** You can search a partial company or account name by including an asterisk (\*) at the end of your entry.

Filter By: Company Name      Criteria: ABC\* i

- 2 Click **Filter Search**.
- 3 Select the appropriate account and click on **Access Invoices**. Invoices can only be accessed at the account level.

Please note: If you have searched by company name or number, you may access the accounts under the company by selecting **Drill Down** at the bottom of the screen.

From the Access Invoices page, you can:

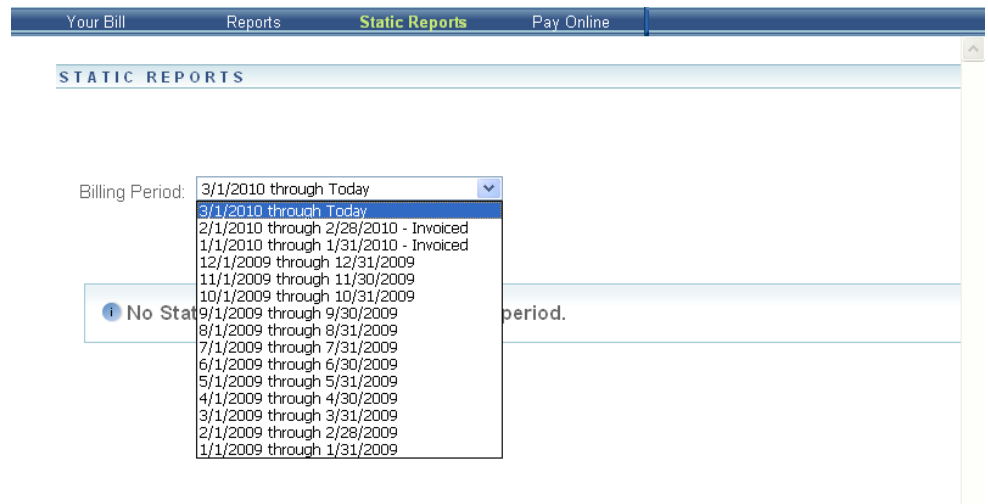
- + View your online bill
- + Access reports
- + Pay online
- + View static reports (PDF invoices)
- + View billing history

## ONLINE BILL

Your online bill is an electronic version of your invoice allowing you to easily view summary data at many different levels as well as detailed data.



- 1 Select the **Billing Period** and **View Type** from the drop-down lists provided. The View Type allows you to view data by folder (name) or by product (feature).
- 2 When there are charges already invoiced, the description 'Invoiced' will appear after the billing period details, so you will know that there are charge details available to be displayed.



- 3 Once an Invoiced period is selected, the list of the current charges for that period will appear. Each item in the list is a link that leads to the additional details for each user.

[Your Bill](#)   [Reports](#)   [Static Reports](#)   [Pay Online](#)

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**ONLINE BILL**

Billing Period:    View Type:

Current Charges

**Payable, Accounts**

- [Doe, John](#)
- [Smith, Susie](#)

- 4 Choose an available feature to link to a new page that shows the usage details for the given period.

[Your Bill](#)   [Reports](#)   [Static Reports](#)   [Pay Online](#)

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**ONLINE BILL**

Billing Period:    View Type:

Current Charges

**Doe, John**

Default\_1\_USD\_rtl

- [Conference](#)

Sub-Total  
Tax Adjustments  
Tax  
**Total Current Charges**

- 5 The new page describes the details of the usage charges for the selected feature. You have the ability to drill down to another level of detail by clicking + or you can get back to the features/charges list by clicking the arrow located in the upper left corner of the screen.

[Your Bill](#)   [Reports](#)   [Static Reports](#)   [Pay Online](#)

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**CONFERENCE FOR 1/1/2010 THROUGH 1/31/2010**

Page 1 of 1

Start Time <sup>A</sup>	Subscriber	Owner Number	Conference Id	Conference Type	Conf Sub Type	PAC	Connections	Mins.
<input checked="" type="checkbox"/> 1/6/2010 8:52 AM - ET	John Doe	2222222	12345678	Automated	2	N/A	17	1247

- 6 The conference features related to the listed charge are displayed. Each feature starts with an arrow icon that leads to a different page that shows the conference details for each connection.

Your Bill									
Reports		Static Reports		Pay Online					
CONFERENCE FOR 1/1/2010 THROUGH 1/31/2010									
								Page 1 of 1	
Start Time ^	Subscriber	Owner Number	Conference Id	Conference Type	Conf Sub Type	PAC	Connections	Mins.	
1/6/2010 8:52 AM - ET	John Doe	2222222	12345678	Automated		2 N/A	17	1247	
<b>Connection</b> <span style="float: right;">Total Universal Service Fund: \$ 0.00    Total State Tax: \$ 0.00    Total Local Tax: \$ 0.00    Total A</span>									

- 7 The conference details page will show each connection's details and will also provide the ability to drill down to a final level of detail for each connection by clicking + again.

Your Bill									
Reports		Static Reports		Pay Online					
CONNECTION									
								Page 1 of 1	
<b>SUMMARY FOR CONFERENCE:</b>									
Conference Id: 12345678		Owner Number: 2222222		Connections: 17		Mins.: 1247			
No Show Fee: \$ 0.00		Port Overage Fee: \$ 0.00		Minimum Fee: \$ 0.00					
PAC Code: N/A									
<b>Connection</b> <span style="float: right;">Total Universal Service Fund: \$ 0.00    Total State Tax: \$ 0.00    Total Local Tax: \$ 0.00    Total Amt.wf</span>									
Start Time ^	End Time	Attendee	Bill Code	Surcharge Code	Call Type	Duration	Amo		
+ 1/6/2010 8:52 AM - ET	1/6/2010 10:23 AM - ET	eRes-Plus -	R - Resless-Plus Local	US - USA	Dial-In	91	\$ 13		
+ 1/6/2010 8:53 AM - ET	1/6/2010 10:23 AM - ET	eRes-Plus -	R - Resless-Plus Local	US - USA	Dial-In	90	\$ 13		
+ 1/6/2010 8:55 AM - ET	1/6/2010 10:23 AM - ET	eRes-Plus -	R8 - Resless-Plus 800	US - USA	Dial-In	88	\$ 13		
+ 1/6/2010 8:56 AM - ET	1/6/2010 10:23 AM - ET	eRes-Plus -	R8 - Resless-Plus 800	US - USA	Dial-In	87	\$ 13		

- 8 The connection details are the last level of detail available.

[Your Bill](#) | [Reports](#) | [Static Reports](#) | [Pay Online](#)

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**CONNECTION**

Page 1 of 1

**SUMMARY FOR CONFERENCE:**

Conference Id: 12345678	Owner Number: 2222222	Connections: 17	Mins.: 12
No Show Fee: \$ 0.00	Port Overage Fee: \$ 0.00	Minimum Fee: \$ 0.00	
PAC Code: N/A			

**Connection**    Total Universal Service Fund: \$ 0.00    Total State Tax: \$ 0.00    Total Local Tax: \$ 0.00    Total Amt:

Start Time <sup>A</sup>	End Time	Attendee	Bill Code	Surcharge Code	Call Type	Duration	Amt
<input checked="" type="checkbox"/> 1/6/2010 8:52 AM - ET	1/6/2010 10:23 AM - ET	eRes-Plus	R - Resless-Plus Local	US - USA	Dial-In	91	
		Bridge Id	3172				
		Origination Number					
		Destination Number					
		Bridge Amount	\$ 12.74				
		Surcharge Amount	\$ 0.00				
		Service Fee	\$ 0.89				
		Telecom Surcharge	\$ 0.00				
		Universal Service Fund	\$ 0.00				
		State Tax	\$ 0.00				
		Local Tax	\$ 0.00				
		County Tax	\$ 0.00				
<input checked="" type="checkbox"/> 1/6/2010 8:53 AM - ET	1/6/2010 10:23 AM - ET	eRes-Plus	R - Resless-Plus Local	US - USA	Dial-In	90	

- 9 If you have been charged for several features in addition to your conference call, the list of charged features will be displayed with the arrow icon in order for you to see the details of those charges as well.

[Your Bill](#) | [Reports](#) | [Static Reports](#) | [Pay Online](#)

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**INTERCALLCONFERENCE FOR 01/04/2009 THROUGH 30/04/2009**

Page 1 of 1

Start Time <sup>A</sup>	Subscriber	Owner Number	Conference Id	Conference Type	Conf Sub Type	PAC	Connections	Mins.	Amount	Amt. w. Tax	
<input checked="" type="checkbox"/> 07/04/2009 3:04 AM	<b>John Doe</b>			Op Assisted		1 118570	12		\$ 166.14	\$ 166.14	
										<input checked="" type="checkbox"/> InterCallConnection	\$ 97.77
										<input checked="" type="checkbox"/> InterCallFeature	\$ 68.37

## REPORTS

The Reports page allows you to access the same data that is available in your online bill, but gives you the flexibility to customize the start and end dates. Select Reports from the top menu.

[Your Bill](#) | [Reports](#) | [Static Reports](#) | [Pay Online](#)

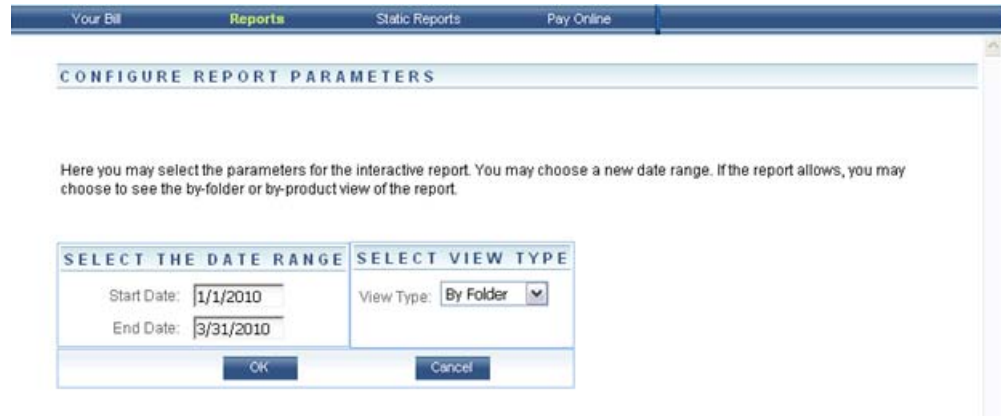
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**YOUR CHARGES**

Start Date: 3/1/2010 | End Date: 3/31/2010 | View Type: [By Folder](#) | [Configure Report Parameters](#)

**There were no transactions for this Billing Period.**

If a different Start and/or End Date are needed, select **Configure Report Parameters**.



**CONFIGURE REPORT PARAMETERS**

Here you may select the parameters for the interactive report. You may choose a new date range. If the report allows, you may choose to see the by-folder or by-product view of the report.

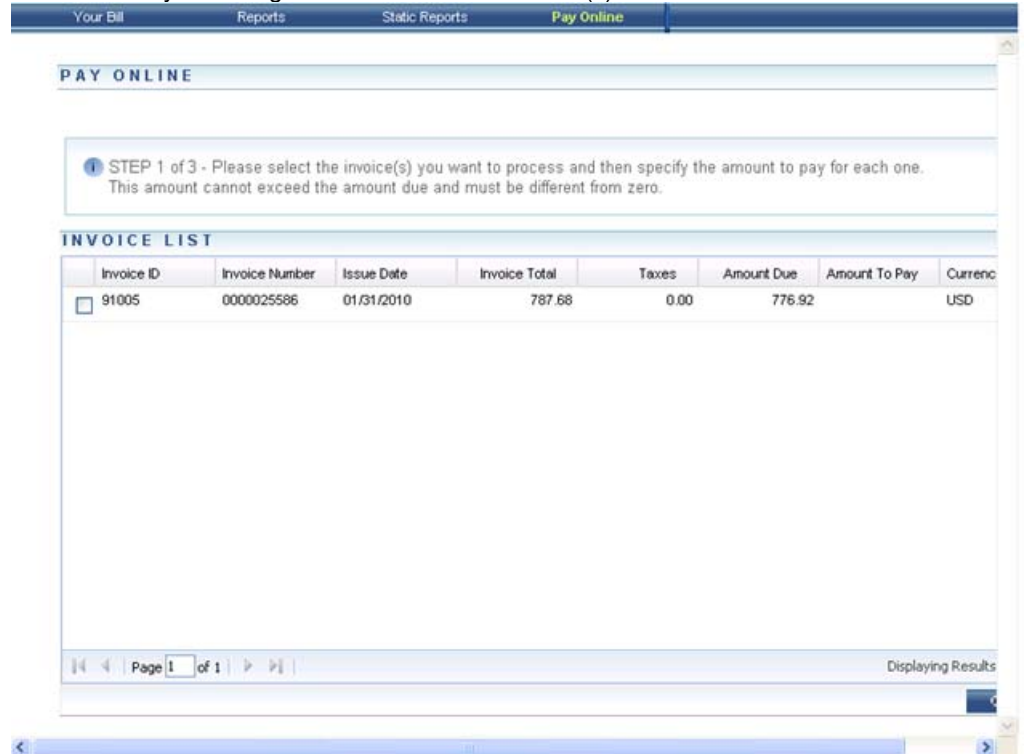
SELECT THE DATE RANGE	SELECT VIEW TYPE
Start Date: 1/1/2010	View Type: By Folder
End Date: 3/31/2010	

OK Cancel

## PAY ONLINE

Pay one or more invoices online with our enhanced pay online functionality.

- 1 A list of all outstanding invoices will be provided. Select one or more invoices from the list by checking the box next to the invoice(s).



**PAY ONLINE**

STEP 1 of 3 - Please select the invoice(s) you want to process and then specify the amount to pay for each one. This amount cannot exceed the amount due and must be different from zero.

Invoice ID	Invoice Number	Issue Date	Invoice Total	Taxes	Amount Due	Amount To Pay	Currenc
<input type="checkbox"/> 91005	0000025586	01/31/2010	787.68	0.00	776.92		USD

Page 1 of 1 | Displaying Results

- 2 You can then designate the amount that should be paid for each invoice (partial payments are acceptable) and click **Continue**.

[Your Bill](#)   [Reports](#)   [Static Reports](#)   [Pay Online](#)

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**PAY ONLINE**

**1** STEP 2 of 3 - Please, verify the information displayed on the list.  
 If everything is ok, then click on 'Continue'. Otherwise, click on 'Back' to modify your selection and the amounts.

**INVOICE LIST**

Invoice ID	Invoice Number	Issue Date	Invoice Total	Taxes	Amount Due	Amount To Pay	Currency
91005	0000025586	01/31/2010	787.68	0.00	776.92	<b>776.92</b>	USD

3 Supply your payment information and select **Continue**.

[Your Bill](#)   [Reports](#)   [Static Reports](#)   [Pay Online](#)

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**PAY ONLINE**

**1** STEP 3 of 3 - Please, give your credit card information. Make sure this corresponds to the billing address of the card.  
 Click on 'Continue' to process your payment.  
 Otherwise click on 'Back' to modify your selection and the amounts.

\* Name On Card   
 \* Card Type   
 \* Card Number   
 \* Expiration Date  /   
 \* ZIP/Postal code   
 \* Country

- 4 You will be provided a confirmation page so that your transaction can be reviewed before saving. Select **Finish** to complete your transaction. If modifications are needed, please select **Back**.

Your Bill   Reports   Static Reports   **Pay Online**

**PAY ONLINE**

Thank you for your payment(s).  
Below you will find the results for each transaction.

**INVOICE PAYMENT - TRANSACTION RESULTS**

Payment Status	Auth. Code	Invoice ID	Invoice Number	Amount	Cur
Payment successfully processed	tst496	91005	0000025586	776.92	USD

Page 1 of 1   Displaying Results

## PAYMENT AND ACCOUNT OPTIONS

Easily manage your payments online. You may store credit card and ACH payment information allowing you to quickly apply payments to your invoices. You may also update your account information to ensure that your invoices are being delivered to the correct recipients via your desired delivery method.

Payment Profiles can be accessed from Manage My Account. Select **View/Edit Account Information**. From the bottom of the page, select **View/Edit Billing Information**.

**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 [Resend Welcome Info Email](#)

Email System Messages:  Yes  No

Conferencing Compass:  Yes  No ⓘ

Educational:  Yes  No ⓘ

Webinars/Training:  Yes  No ⓘ

Promotional:  Yes  No ⓘ

Options:

Language Preference:

Protect From Reset:  Yes  No

Email Address Change Notification:  Yes  No

▶ To Manage Multi Pac [Click Here](#)

▶ To Manage Activity [Click Here](#)

▶ To Manage InterCall Web Meeting Site [Click Here](#)

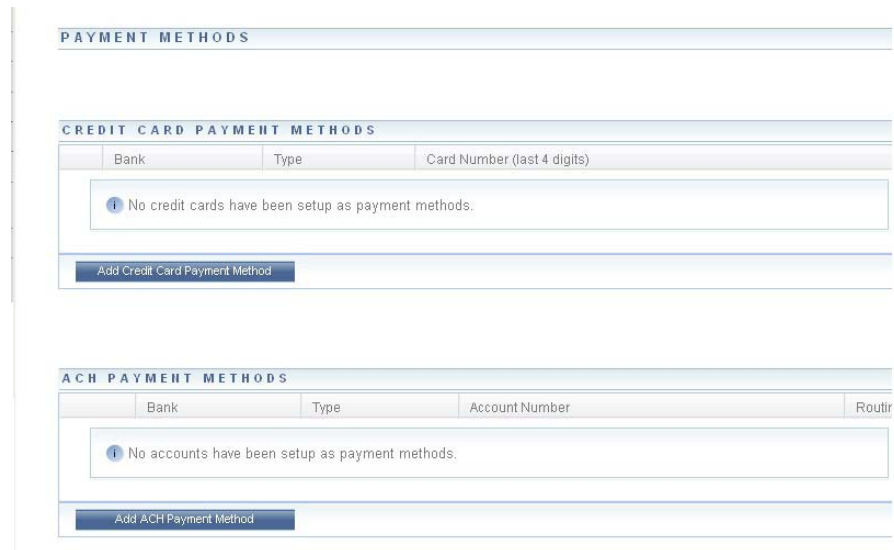
▶ To Set Email Domain Check [Click Here](#)

**View/Edit Billing Information**   Pay Invoice   Save Changes

You will then have the option to select **Payment Methods**.



- 1 Select **Payment Methods** to create or modify credit card and ACH payment profiles.



- 2 Select **Add Credit Card Payment Method** or **Add ACH Payment Method** to create a new payment profile. To modify existing payment profiles, select one of the payment methods listed. **By checking the box next to “Set this payment method as my preferred payment method for future transactions”, you can designate this profile as a recurring payment method.**



- Required fields are labeled with a red asterisk (\*). Fill in required fields or make appropriate modifications, then select **OK** to save.

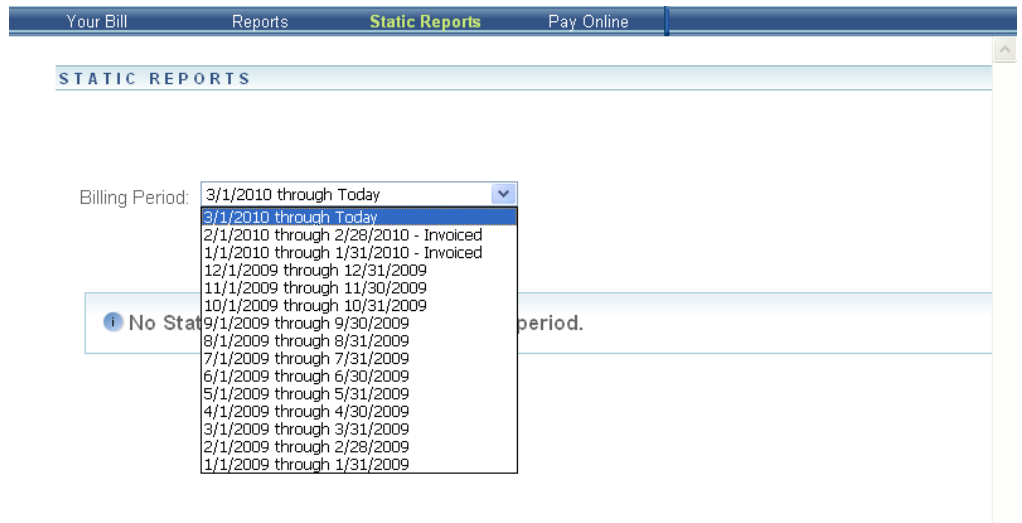
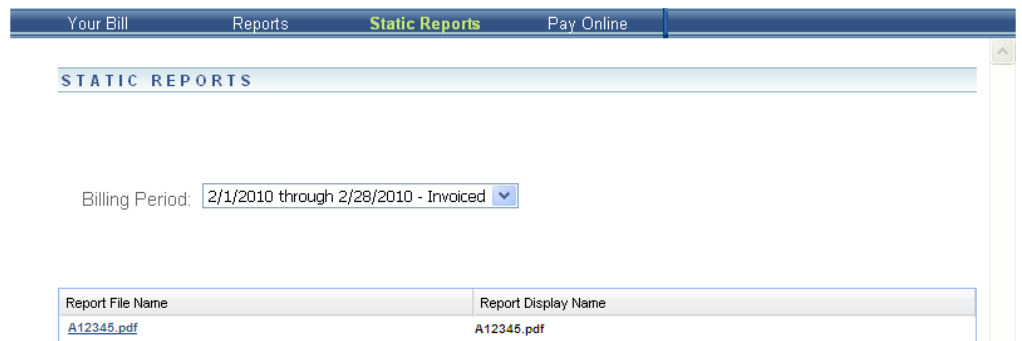
## STATIC REPORTS

View a PDF copy of your paper invoice.

- Select **Static Reports** to the right of the View Type drop-down box.



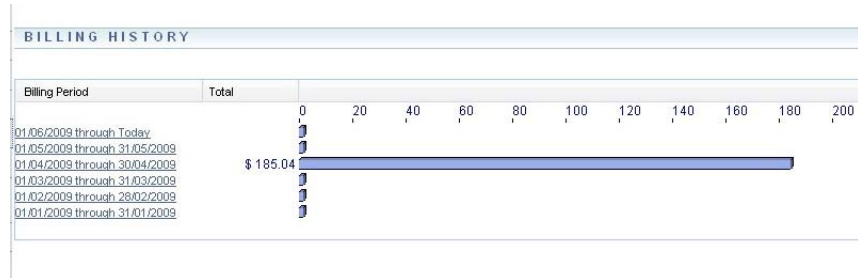
- Select the **Billing Period** from the drop-down box. A link will be provided to the PDF copy of that invoice. You may then view the PDF or save a copy to your computer.

Report File Name	Report Display Name
A12345.pdf	A12345.pdf

## BILLING HISTORY

Access a bill trend chart for your account.



- 1 Select **Billing History** to the right of the View Type drop-down box.



Navigation: [Your Bill](#) | [Reports](#) | [Static Reports](#) | [Pay Online](#)

Period: 2010 through Today | View Type: By Folder | **Billing History**

0 transactions for this Billing Period.